DOCUMENT RESUME

ED 251 096 IR 050 918

TITLE Skills Training. SPEC Kit 40.
INSTITUTION Association of Research Libraries, Washington, D.C. Office of Management Studies.
PUB DATE Jan 78
NOTE 92p.
PUB TYPE Collected Works - General (020) -- Guides - General (050) -- Reports - Descriptive (141)

EDRS PRICE MF01/PC04 Plus Postage.
DESCRIPTORS *Academic Libraries; Guidelines; Higher Education; Job Skills; *Job Training; *Library Personnel; Library Surveys; *Library Technical Processes; *Library Technicians; Research Libraries; Skill Development; *Training Methods

ABSTRACT

A 1977 Association of Research Libraries (ARL) survey investigated how libraries were training personnel for routine tasks. Of the 73 responding libraries, more than 75% (58) reported that manuals and procedural guides, along with on-the-job training, were the main methods of instruction for technical skills. Accordingly, this kit on skills training in ARL libraries contains 11 documents from member libraries grouped in 3 clusters: (1) manuals/procedures: on bibliographic searches from Texas A&M, circulation procedures from University of Tennessee/Knoxville, periodicals processing from Syracuse University, emergency procedures from Pennsylvania State University, and interlibrary loans from University of Wisconsin/Madison; (2) trainers' guides: on orientation for new reference librarians from University of Georgia, training clerical supervisors from Branch Libraries of the New York Public Library, and filing workshop and evaluation forms from Columbia University, plus a staff performance evaluation from McGill University; and (3) training program materials, including sample pages from a programmed filing text from Rutgers University and a self diagnostic test on reading call letters from University of Hawaii. A concise summary of issues and trends in skills training and a listing of training materials compiled from the Systems and Procedures Exchange Center (SPEC) 1977 survey introduce this collection of documents from member libraries. (THC)

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JANUARY 1978

Systems and Procedures Exchange Center

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# Skills Training

# Kit 40

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January 1978, No. 40
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# SKILLS TRAINING IN ARL LIBRARIES

The effective training of staff members to perform routine technical tasks is a growing concern of large research and academic libraries as they face continual pressure to improve performance and make the best use of stable or reduced staffs. A SPEC survey in September 1977 investigated how libraries are dealing with training for routine jobs. The survey -- which asked for documentation on training manuals, procedures, and programs for performance of day-to-day operational tasks -- was answered by 73 libraries. Over three-fourths (58) report that manuals and procedural guides, along with on-the-job training, are the main methods of instruction for technical skills. However, few libraries report using training materials to assist supervisors in staff training, and there was little documentation on evaluating the effectiveness of training procedures and programs, other than that which might be implicit in performance appraisal of individual staff members.

On-the-Job Training and Procedures Manuals. Documentation from the SPEC survey suggests that on-the-job training is an ongoing process within library units, particularly those dealing with tasks such as shelving, shelf-reading, card filing, inventories, circulation activities, reserve materials procedures, serials check-in, and activities related to the automation of previously manual operations. Within work units, supervisors are usually responsible for training student assistants and new staff members, sometimes with the assistance of a personnel or staff development librarian. In other instances, much of the training in libraries is carried out by peers who perform the same or similar tasks.

Almost every responding library indicates that manuals and/or procedural guides are available to support training. However, most of the manuals are designed to describe the policies and work norms for a department or unit and are informational, rather than instructional. Technical service manuals are used particularly for recording examples of common problems or for listing processes to be followed in carrying out a procedure. Public service manuals tend to be of the operational type, dealing with issues like handling reserve collections, shelving books, and circulation desk procedures.

Manuals seem adequate for describing simple routine tasks. They supply consistent information to each student assistant or support staff, and provide answers to the most frequently asked questions. But producing, maintaining, and updating manuals, which are often lengthy, is an expensive process. Furthermore manuals are of limited value for training when a job is complex, when a learner has trouble in understanding a task, or when a staff member must interact regularly with users. Finally, manuals have little flexibility to allow for variations in the ways people learn. For such reasons, training is often conducted person-to-person, and on-the-job, even though such methods are more time-consuming and costly.

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Orientation and Training Programs. Supervisors retain the primary responsibility for identifying and fulfilling training needs: they schedule training, select resources, and conduct follow-up evaluation to ensure the best use of staff. Supervisors are responsible for orienting new employees to the work of their unit and to the library's policies and procedures. In addition, individual orientation assures that new employees are introduced to co-workers and are acquainted with the surroundings. As the workload in libraries expands, however, libraries report that daily operational responsibilities limit time available for training staff.

In some libraries, personnel and/or staff development librarians support supervisors' training efforts by designing, developing or coordinating training programs. These efforts typically include general orientation to the mission and nature of a research library and to organization-wide policies. Personnel librarians responding to the SPEC survey indicate interest in developing more specific skills training resources, but their responsibilities for managing recruitment, benefits, and grievances often limit their time to do so.

Needs and Trends. While most research libraries have depended upon individualized, on-the-job training and department-wide informational procedure manuals for much of their training, many libraries responding to the survey indicate a growing interest in developing new on-going training programs and resources. Unit supervisors, faced with the responsibility of improving unit performance with relatively stable staff size, are looking to training to provide some of the answers, in some cases with help from staff development and personnel librarians. Although purchase of training materials is an option, few resources are available that deal directly with research libraries. One alternative is to train supervisors in the skills necessary for them to train their staff. Another option is to improve the ways of explaining procedures by exploring and adopting successful techniques developed in industry and the medical field, such as self-study learning kits and intensive workshops. Some libraries are experimenting with self-instructional or mediated training materials, including programmed texts or computer-based instruction on filing, slide presentations on paging and shelving, and videotapes on public service attitudes. Other libraries have developed classroom lectures and workshops for operations such as filing and shelving.

Whatever instructional methods research libraries choose, the continued need for training requires that frontline supervisors re-emphasize their purely supervisory responsibilities as opposed to the technical responsibilities of doing the work of the unit. This requires the development of both the commitment and the skills needed to train staff on a regular, on-going basis.

* * *

The SPEC Kit on Skills Training in ARL Libraries (No. 40) contains 11 documents from member libraries illustrating manuals/procedures, trainers' guides, and training program materials. It also contains a 29-page listing of training materials, compiled from the September 1977 SPEC survey (87 pages total). The Kit is available for $7.50 to ARL members and subscribers and for $15.00 to all others (prepayment required) from: Office of University Library Management Studies, Association of Research Libraries, 1527 New Hampshire Avenue, N.W., Washington, D.C. 20036.

SKILLS TRAINING IN ARL LIBRARIES

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# TEXAS A&M UNIVERSITY LIBRARIES
## Sterling C. Evans Library

BIBLIOGRAPHIC SEARCH MANUAL

The attached was designed by Don Dyal, Special Collections librarian, and was originally used by him, when he was a part of the Acquisitions Department, to train clerical staff. Requests for more information or copies of the entire manual, with sample cards, title pages, etc., should be directed to Pamela Walton, Head Personnel Operations, Texas A&M University Libraries, College Station, Texas 77843.

PW/wc

11-8-77

# A BIBLIOGRAPHIC SEARCH MANUAL

by

Don Dyal
Texas A&M University Libraries

THE MANUAL:

There are four different practice stages which comprise the Bibliographic Search Manual.

STEP I. FILING RULES.

It is imperative that the prospective searcher have a detailed working knowledge of filing rules for both card catalog use and National Union Catalog searching. A three-page extract of the ALA Rules for Filing Catalog Card provides a useful tool to introduce the searcher into the complex world of alphabets and their rules. After a comprehensive discussion with examples of each of the nineteen points on the filing rules extract, a filing exercise is given to the searcher. The filing exercise consists of about 80 3" X 5" cards with main entries and titles (subjects could also be used). The searcher is asked to file them in correct order. There is no time limit to this exercise - or any other, and it is "open book"; that is, the searcher is encouraged to use the filing rules extract. Errors are used as teaching points and depending on how well the searcher has done, the supervisor can either move on to Step II or review the rules again and do another exercise. In over four years of using this system, I have never had to do another exercise with a searcher. Patience and using lots of examples when discussing the filing rules extract will always pay off.

STEP II. MAIN ENTRIES

A discussion of the general rules for main entries enables the new searcher to understand why and how searching can best be accomplished. Although it is difficult to second guess Library of Congress practice, the searcher can be taught and brought to a level of competance in developing best-guess entries. As with step one, a practicum is used consisting of title page statements (see enclosure number one). As the searcher is invited to make the "best guess" on each example, the supervisor can re-enforce principles of main entry through each example.

STEP III. CATALOG CARDS

To ensure successful searching, I have always insisted that each searcher be able to discriminate between each of the different types of cards and the parts of the cards. The searcher must be able to distinguish a monograph from a periodical, a set from a serial, a closed set from an open set, etc. Additionally, the searcher must be able to instantly identify a series (traced or untraced - numbered or unnumbered) and the correct entry of the series. Cataloger's notes can be of inestimable value for bibliographic history, title changes, unique editions, etc. The matching of title to cataloging is essential and demands training.

Accordingly, after a preliminary discussion on the parts of the Library of Congress card and how to tell different types of cards and formals on the card, a rigorous practicum is used which employs virtually every type of card the searcher will encounter. Again the practicum is not so much a test as a teaching methodology to reinforce concepts. The practicum concluded, the searcher is taken to the public card

catalog and randomly tested with actual cards until the searcher is thoroughly proficient. (After the discussion and practicum, the time necessary in the catalog is only five to fifteen minutes.)

STEP IV. SEARCHING

This step consists of three parts. First, the searcher must be familiar with the chronological arrangement of the National Union Catalogs. Explanations about alphabets and cross references and guides to long sections (New York, United States, Shakespeare, Bible, etc.) are best done with the National Union Catalogs themselves. The standards of searching competence are reinforced and demonstrated by supervisor examples. Second, the correct way to fill out and annotate the search form is explained. Lastly, the searcher is introduced to the practice manuals. The practice manuals consist of numerous xeroxed title pages and versos from actual books. Pagination is included on the title page to aid in matching with copy. These practice manuals are to be treated just like real books and are searched as such; search forms are filled out. The practice manuals combine all of the skills the searcher has been mastering into one large field problem. My search manuals have around 40-50 titles to be searched, divided into books by level of difficulty. The searcher would be given Book I first, which has nothing but fairly straight forward entries and titles. After the searcher has completed Book I, the searcher and the supervisor go over each title and each search form for errors and to provide a forum for questions and further training. Of course, the supervisor has an answer book with notes on each title indicating the best strategy and alternate strategies to find each title. Irregularities in cataloging and cross-references are also noted. Searcher errors are re-searched after the searcher has

been led (not told) through hints or clues or a re-discussion of rules. In these first easy books, the supervisor must early establish the standards of performance so the searcher learns what is required. As the searcher finishes the first book, good habits and rational search strategies should be evident. The procedure continues with more difficult titles so that by the last book, the searcher is really challenged. The types of search problems which the manual has are many: corporate authors, multi-alphabets (New York is a good example), compound surnames, pseudonyms, multi-author works, government publications, symposia, conferences, proceedings, meetings, series cover cards, reprints, translations, different editions of various forms, foreign language materials, etc.

A caveat is in order at this point. Many new searchers freeze when first required to integrate all their training into doing that first example. Therefore it is a good idea for the supervisor to do the first two or three examples to get the searcher started on a positive track. Also, I always tell the searchers that if they get stuck on one of the examples to spend no more than 20-30 minutes on it. If the searcher cannot crack it, then the searcher should ask the supervisor for help. The purpose of the practicum is not to show the searcher how much the supervisor knows nor to toss the searcher to the wolves. Rather the practicum is necessary to build and strengthen good searching strategies and habits. If the searcher becomes frustrated or exasperated, then no learning has been accomplished and considerable harm may have been done. The practicum is a teaching tool.

After the searcher has mastered the search manual, searching on OCLC is a "piece of cake" and takes very little time. The training time

required using the search manual varies considerably. Depending on the communicative skills of the supervisor and the experience or native intelligence of the searcher, the training time can be hours or days. The shortest time in my experience was one and a half days (just under twelve hours). The longest was almost five days. However, because both used the search manual, the searching performance of these two extremes was not significantly different.

Don Dyal
Bibliographic Search Manual
Enclosure number 1

1. A humble romance, and other stories, by Mary E. Willkins Freeman.

2. The correspondence of George Eliot Stewart, 1720-1780, ed. by Roland Sturt.

3. Selected writings of Saint Thomas Aquinas.

4. Profiles in courage, by John F. Kennedy.

5. State of the Union message, January, 1961, by the President of the United States, John F. Kennedy.

6. Science, the endless frontier. A report to the President by Vannevar Bush, Director of the Office of Scientific Research and Development, United States Government.

7. Modernizing a city government; report by the Home Rule Commission of the city of Chicago.

8. The immigration and naturalization systems of the United States. Report by the Committee on the Judiciary, United States Senate.

9. Annual Report of the Free Library of Philadelphia.

10. Report on unemployment in the State of Michigan, prepared under the direction of John F. Collins, Chief of the Bureau of Labor Statistics, Department of Labor, State of Michigan, and his staff.

11. Journal of the American Folklore Society.

12. Journal of Kentucky Folklore, published by the Kentucky Folklore Society.

13. Program of the IXth International Congress of the History of Science held in Madrid, May 1960.

14. Report of the director of Whitney Museum of American Art, New York City.

15. Rapport du Conseil Municipal de Bruxelles.

16. Journal of the New York State Medical Society.

17. Collection des lois pour la protection des enfants, Republique de France.

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These are some of the "frequently asked questions."

Any question you can't answer should be refered to circulation unless they are reference questions * which should be sent to Reference.

* (questions for which you need to use the card catalogue, index, or other library materials to find the answer).

1. Can Film be checked out of Non-Print for use in school?
   No, they are for library use only.

2. Where can one find missing issues of periodicals?
   Check with circulation. They may be abie to track the periodical down.

3. Does the duplication in Non-Print also enlarge or reduce?
   No. There is a reducer at Duplication at Main Library.

4. Can you get a refund for bad copies made on copy machines?
   Yes. Take bad copy to circulation and they will refund money.

5. Can records be checked out?
   No, all records and tapes, etc. are for library use only.

6. Where is Reserve?
   On first floor-north-east corner of building.

7. Where can I find periodicals?
   Current periodicals are in Reserve. Old periodicals are on each floor according to their call numbers. The student should go to Reference on the 3rd floor and consult the periodical index to get the call number.

8. What is Non-Print Department?
   The department contains tapes, micro-film, vidiocassetts, copier, and art history slides. It is on the 4th floor.

9. Where can I get change?
   Change can be given for small amounts of money in the circulation department.

10. Where are the typewriters?
    They are on 1st and 4th floors in the glassed study areas. 10¢ for 10 minutes, 25¢ for 30 minutes.

11. Where are copy machines?
    There are copiers in Reserve and one on each floor of the building. 5¢ a copy. There is a better quality copier in Non-Print for 7¢ a copy

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12. Where are the restrooms?
There are restrooms on each floor in the center of the building.

13. Where are the dictionaries?
There is a collection of all kinds of dictionaries in Reference on the 3rd floor. There are also dictionaries on stands on each floor (except 2nd) at the north and south ends of the buildings.

14. Where are the pencil sharpeners?
There are sharpeners on each floor at the north and south ends of the building.

15. Where are curriculum materials and juv. books?
They are in Reserve.

16. Where are cataloges of other colleges?
Main non-print.

17. Where can I pay fines?
On regular books, circulation.
On reserve books, reserve.

18. Where can I get ID punched or validated?
Circulation.

19. Where can I put a hold on a book?
Circulation.

20. Where can I find out if a book is checked out?
Circulation.

21. Can periodicals be checked out?
No, they are for library use only at UGL-At all other libraries, they can be checked out for 3 days.

22. How many books can a person check out?
There is no limit.

23. Where is lost and found?
There is a temporary lost and found in circulation and a more permanent one in the Administration Office on the 3rd floor.

24. Where is the card catalogue?
3rd floor Reference.

25. Where is there a telephone?
There are pay phones at the 1st floor entrance.

26. Where is the Main Library?
On the corner of 16th and Cumberland.

27. Where do I put books after I have used them, if I have not checked them out?
Leave them on the tables. If you have checked them out, return them to circulation.

28. Is there a paging system?
No.

29. Problems understanding call numbers?
Send them to Reference.

30. Where are the fiction books?
Fiction is on the 5th floor. The F books, on the 1st, are history books.

Example

| | | | |
|---|---|---|---|
| F | | F328 | |
| S298c | Fiction | .T29 | History |
| cop. 2 | | cop. 2 | |

31. What are the library hours?
8:00 a.m. to 11:30 p.m. Monday-Friday
9:00 a.m. to 6:00p.m. Saturday
1:00p.m. to 11:30 p.m. Sunday
Extended hours-Fall, Winter, Spring. 9:00 AM Sunday to 11:30 PM Friday.
Open until 11:30 p.m. on Saturday on the 1st floor.

32. Where is Afro-American Collection?
On 1st floor next to the turnstyle.

33. Where do I return a book?
Regular books-Circulation
Reserve books-Reserve

34. Where are newspapers?
2nd floor. We keep about 1 week of back issues. Current issues of the Beacon are kept in the reference department and are for use in library only. Old volumes of the Beacon are on the 5th floor. A better collection of papers is at Main.

35. What do I do if I can't find a book?
Go to Circulation.

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36. For how long can I check out a book?
Except for Reserve books, whose loan periods vary, all books are checked out for 2 weeks to all people (students, staff, and faculty).

37. Do night school students need ID's?
Yes, you must have a validated ID to check out a book. They may obtain an ID through the Evening School Office. Day students can get an ID at room 343 of the Student Center if they present a current fee receipt.

38. Can Knoxville College students check out books?
Yes, they need to have a current Knoxville College ID.

39. Where can I return Main Library books?
There is a book drop on the corner of Andy Holt and Volunteer. They may not be returned at UGL.

40. Is there a paper cutter in the building?
No. But you can use scissors available at 2nd floor circulation.

## ENGINEERING AND LIFE SCIENCES (ELS) PERIODICALS DIVISION

"What is kept in a library?"

Of course, the common answer to this question is "Books!"

However, a book is not simply pages and covers. Also, pages and covers do not always constitute "books," in the general sense.

Periodicals are a special form of "book." A periodical is defined as an item which is published in a series, regularly, and two or more times a year. You might recognize periodicals as magazines or journals, but to the library they are periodicals, because we can with some accuracy predict or expect the next issue to be published two or more times a year at regular intervals. The library records the receipt of each periodical, stores it in a periodical reading room and binds it into book-type volumes at selected times of the year.

If an item is issued in a numbered series, but is not regular or predictable, and is not received two or more times a year (e.g. annual), we call it a "serial." Serials are handled in a different department in ELS.

You will be working in the Periodicals Division of ELS. There are tasks and problems in this department which are unique; not to be found elsewhere in the ELS library system. For this reason, keep in close touch with your direct supervisor and the updates, procedures and memos which originate from his or her desk.

PERIODICAL PROCESSING--AN INTRODUCTION

The periodical processing division at E/LS coordinates and monitors all E/LS journal subscriptions. Because periodicals serve as a valuable source of current information, and because patrons rely heavily on them as a research tool, the jobs associated with periodical processing demand accuracy and attention to detail.

We are responsible for keeping accurate records of all incoming periodicals (what issues are received and when) as well as:

1) replacing those issues that are stolen or damaged
2) claiming those that are ordered but never received
3) keeping records up to date (cancellations, title changes, etc.)
4) sending completed volumes to the bindery (as well as keeping records of what is sent, when it is sent, and the date it returns)
5) recording the bound volumes returning from the bindery on the public record (the shelf list)
6) correcting errors in the print-out
7) and keeping the periodicals in Room 103 shelved and in order.

In short, the periodical processing division at E/LS is responsible for the entire cycle through which a periodical title moves within the S.U. Library system. We are responsible for catching problems as they arise.

Please feel free to ask questions. IT IS EXPECTED! Many of the problems that are dealt with in periodical processing are complicated and should be brought to your supervisor's attention. It is important that all decisions concerning policy and procedure originate with your supervisor, if only for the sake of consistency. Please communicate when you are unsure, confused or frustrated.

Hopefully you will enjoy your work, as well as contribute to the efficiency of the department. The following information is a general introduction, and will help to get you oriented....

## FINDING A PERIODICAL

The public print-out is an alphabetical listing of periodical titles published regularly two or more times a year, currently received in the Syracuse University Libraries. Periodicals that have changed titles will be listed under the most recent title and will usually have a cross reference to any previous title that may exist. However, always consult the card catalog for previous titles, for titles that have ceased publication, for those to which we no longer subscribe, or for any title which you do not find in the print-out.

The pring-out provides the following information for each periodical:

- Title
- Call number
- Unbound location (location of current issues)
- Bound location (location of back volumes)
- Date of earliest volume in the collection
- Frequency of publication

EXAMPLE

Look up SCIENCE in the print-out:

| Title | Call no. | Unbd.loc. | Bound loc | Freq. | Bind. status |
|---|---|---|---|---|---|
| SCIENCE | Q1.S41 | ELS | ELS | WE | B |
| SCIENCE | Q1.S41 | PHY | | WE | |
| SCIENCE | Q1.S41 | BIO | | | |
| SCIENCE | Q1.S41 | CHE | | WE | |

The print-out tells you:

1. There are four subscriptions to SCIENCE in the system, one of which is in E/LS.
2. The call number of SCIENCE is Q1.S41.
3. SCIENCE is a weekly publication.
4. There is a bound run of SCIENCE in E/LS.

In general, our recently received issues of a title are located in the Reference/Periodical Room, Room 103, in alphabetical order. Bound volumes (older issues) are kept in their correct call number location in E/LS.

If you are looking for a bound volume of a periodical and the volume is not on the shelf in the stacks according to the call number:

1. Make sure you have the correct call number by checking it in the shelf list. If you are having a problem, do not refer to the print-out.
2. If the call number is correct then make sure that the volume in question is actually owned by E/LS. The shelf list for any periodical title includes holdings cards which contain a consecutive listing of all the volumes found on the shelves in E/LS. If the volume is not listed on the shelf list, check the Kardex for items being currently bound or waiting to be bound.

Miscellaneous Information

If the name of an organization is part of the periodical title, the periodical will be listed under the name of the organization.

EXAMPLE #1:

Journal of the American Dietetic Association.

see; American Dietetic Association. Journal.

EXAMPLE #2:

The Proceedings of the Royal Society of London.

see; Royal Society of London. Proceedings.

If the title begins with an abbreviation or an acronym, it is filed alphabetically, but is listed before words beginning with the same

letter that are spelled out in full.

EXAMPLE #1:

IEEE Proceedings
IEEE Spectrum
IEEE. Transactions on Broadcasting

are listed in alphabetical order (asthey are in the example) at the beginning of the I's.

ADAS Quarterly Review
AIAA Journal
ASCE. Construction Division. Journal.

are listed in alphabetical order (as they are in the example) at the beginning of the A's.

Please note: a list of abbreviations is used in the public print-out to identify the various Syracuse University Libraries. The following is a list of those abbreviations:

| | |
|---|---|
| Bird | BIR |
| Chemistry | CHE |
| Engineering and Life Science | ELS |
| Geology | GEO |
| Law | LAW |
| Math | MAT |
| Physics | PHY |

## USING THE PERIODICAL KARDEX

The periodical Kardex is the library's only tool for checking in issues of periodicals and keeping track of their receipt, frequency and binding status. Each periodical title is checked in on its own card which is filed in the Kardex alphabetically by title. Each card contains a variety of information concerning the title. The following examples show what some of that information is and how to interpret it.

The top of every Kardex CHECK-IN card is used for reference information concerning the title. Such information includes:

1. Call number
2. Title change information (if applicable)
3. Start date (of holdings)
4. Location of other copies
5. Title page & index info, if any
6. Frequency (e.g., monthly, weekly, quarterly...)
7. Control number assigned to the periodical
8. Fund code, which indicates which department in the S.I.U. Library system pays for the periodical
9. ISSN: (International Standard Serial Number)-- for possible use in the future in computer identification.

The bottom line of every Kardex CHECK-IN card contains the title, as well as its shelving code, if applicable. (a section follows which explains shelving codes.

There are two formats for the body of the Kardex check-in card.

EXAMPLE A:

This card is used for periodicals which are published monthly or less frequently (e.g., semi-monthly, quarterly, etc.) It can accommodate several years. The date on which a particular issue arrives is written within parentheses on the card; to the right of the box which contains the issue number.

A: Year and volume
B: Check in space fo each issue received in a year
C: Monthly designation
D: Title page & index info
E: Space allocated for shelving code, if applicable

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EXAMPLE 3:

This type of Kardex card is used for publications which are published more frequently than once a month (e.g., weekly, bi-weekly). This card can accommodate only one year at a time, with the twelve months recorded vertically (see A) and the days of the month recorded horizontally (see B). The recording of incoming issues reflects the month and day of publication, with the 'date received' to the right in parentheses.

A- Months of the year
B- Days of the Month
C- Title and shelving code, if applicable

The other type of card used in the Kardex (other than the check-in card) is the BINDERY CARD. For each periodical title, there is a bindery card. The bindery card is filed immediately after the check-in card for a given title, and contains information pertinent to the binding status of the item.

Before it is sent to the Bindery in Bird, each volume or part of a volume (for example, Jan.-June or #1-6) is recorded on the bindery card. This allows the staff to know when a particular volume or part of a volume is out of the library for a period of time.

The information recorded on the bindery card includes:

1. Title as it appears on the spine.
2. Special binding instructions. These may concern information to appear on the spine, the frquency of binding, or a title variation.
3. Volume, when necessary, months or issue numbers of items sent, and year.
4. Date sent.
5. Date returned.
6. Color used to bind, when necessary.



020

The Periodical "Supplementary Kardex"

If you are having trouble finding a title in the Kardex, check the "supplementary Kardex", located on top of the Kardex file. This is a file of titles which fall under one of the following categories;

1. Titles which are found in the Kardex under a title which is not immediately recognizable from the issue cover.
2. Titles to which we do not subscribe to for public use, and which are routed to the Bibliographers. Routing instructions are found on each supplementary card.
3. Titles which belong in other libraries but which are frequently misdirected to ELS.

KARDEX CODE

The following are codes used on the periodical Kardex for identifying titles which receive 'special handling'.

(Red): "Reserve". Titles with this color code are put on reserve, which is located behind the circulation desk.

(Blue): "Abstracts and Indexes" Titles with this color code are located in the North and East corridors.

(Green): "Reference" These titles are shelved (once they are bound) in the Reference section in Room 103.

Other codes include:

CVO: "Current Volume Only" This designation indicates that the E/LS Library does not bind that particular title. Rather, individual issues are kept for one full year and then discarded.

'Keep 2 years': Like CVO, these titles are not bound by ELS. Instead they are kept for two full years and then discarded.

I. BOMB THREAT

A.

(PLEASE KEEP THIS CARD BY YOUR TELEPHONE)

WHAT TO DO IF A BOMB THREAT IS PHONED IN

1. Lay phone on desk without depressing hold button.
2. Use another phone (and line) to call Campus Patrol (5-5458).
3. Don't hang up until Campus Patrol calls back to tell you to do so.

---

Pollock - use campus phone in west stairwell
East - use any campus phone on first floor - (post office, co-ordinator's office)

B. Follow instructions given by Police Services (Campus Patrol)- see attached guidelines for evacuation of library

C. Report to Supervisor

II. FIRE - be familiar with the location and use of fire extinguishers

A. Use judgement as to whether you car extinguish the fire.

B. If you cannot:
   1. Sound alarm
   2. Dial 110
   3. Evacuate the bldg.- should already be leaving since you sounded alarm.

C. Report to Supervisor

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LLL. ACCIDENTS (Patrons and Employees)

A. Determine if person requires medical attention - if in doubt assume he does
   1. If yes - call ambulance service - 865-6537

B. If employee - fill out accident report as soon as possible
   If patron - get as much information as you can about the accident.

C. Report accident to Supervisor

IV. MISSING MONEY - anything

A. Report to Supervisor immediately

V. PHYSICAL PLANT PROBLEMS - heat, overflowing, water, lights, etc.

A. During day - Report to Supervisor

B. During evening - (after 4:30 p.m.) - Report to Supervisor
   Supervisor will inform you as to whether you should call emergency maintance. 865-2596



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[illegible] TO GO IN CASE OF:

VI. EQUIPMENT REPAIR:

A. DALS - broken headsets, problems with tapes, etc.
call 865-1325

B. Copy Machine - out of paper, poor copies, etc.
call 355-0837
(put note on machine - stating time and date you reported)

C. Typewriters
call 238-0568
(put note on typewriter)

VII. OTHER PROBLEMS

A. Call Police Services:
1. A group of students are very noisy and you cannot quiet them (arguing, etc.)

2. You are having problems opening or locking doors to library

B. Report call to Supervisor

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In the event of a fire or bomb threat in Pollock or East Halls Library, the following guidelines for evacuating the libraries are to be followed:

1. The desk attendant will ask persons using the libraries to leave immediately and take all their personal belongings with them. It is your responsibility to make sure all persons are out of the building before you leave.

2. Evacuation points:

   EAST (Findlay Hall)
   Exit via front entrance next to the Reference desk: proceed to top of stairs and exit.
   Alternate exit - via west exit (emergency doors), turn left exit via stairs in corridor to first door and outside.

   POLLOCK
   First floor exit via rear south exit or main exit doors. Second floor exit via east or west stairs to first floor and out Main Exit.

   Make sure conference room and typing room are cleared on the second floor.

3. Student Assistant will remain outside of building after evacuation and wait for re-opening instructions.



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I. Broad categories of job responsibility for the Typist II

II. Step by step description of each task in each job category.

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Categories of Job Responsiblity for the Typist II

1. Sending Out Books to other libraries (includes making loan statistics.)

2. Returning Books we have borrowed

3. Typing Requests
   1. Requests for loans (includes CRL)
   2. Requests for photoduplication of articles and theses
   3. Requests for locations from the National Union Catalog (includes NUC statistics
   4. Requests for WILS (includes TWX statistics)

4. Making Statistics for regular requests (includes preparation for mail and files)

5. Taking Care of Mail Duties
   1. Delivering, sorting, and [illegible]ing mail
   2. Processing mail meant for [illegible]e Typist II
   3. Performing other duties [illegible]side the office while delivering mail

5. Filing
   1. Patron card files-alphabetical by patron name
   2. School card files-alphabetical by school name
   3. Dead file files-alphabet[illegible]al by author entry

6. Checking in our Bocks which other libraries have returned

7. Doing End-of-Month Jobs

8. Performing other Typing Duties
   1. Letters and reports for Head of ILL
   2. Claims
   3. Invoices (samples- in red-orange box on Lib. Tech's desk)
   4. Small notes to other libraries concerning books or requests.
   5. New forms to be printed (samples in folder in right hand drawer of Typist II desk) (Masters copy are sent to Ella in Card Production to be reproduced.)

9. Performing ohter Duties
   1. Requesting Renewals
   2. Doing Refuslas
   3. Handling Mail from Circulation (includes sending overdue notices)
   4. Keeping Student Payroll Records for Interlibrary Loan.
      Files in right hand drawer has all records.
   5. Answering Interlibrary Loan phone
   6. Getting Supplies (between 10-10:30 AM)
   7. Turning postage money to Acquisitions (Directly to Mr. Dewey)
   8. Canceling Requests
   9. Keeping other insurance statistics
   10. Doing once-a-year duties annual statistics report, prepare new book
   11. Miscellaneous


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SENDING BOOKS OUT to other libraries (Includes loan statistics)

. Remove books from shelf marked "Books brought down by Circulation" and put all items on Typist II desk.

. There should be an Interlibrary Loan form in each book or group of volumes.
a. Instead of a regular fomr in the book, there may be a letter, a TWX sheet, a photoduplication form or a jotted down phone message. In all of these special cases, it is necessary for you to type a standard form.

1. Use one of the 5 page forms entitles "Interlibrary Loan Request" that are located in the shelf on the Typist II desk.
2. Change the BORROWING LIBRARY title at the top to LENDING LIBRARY and the opposite on the bottom.
3. Use the information that the requester has given and the information from the book to fill in whatever information is given (patron name, call number, author,title, place, publisher, date, verification and borrower's name.)

b. If the book does not have any form in it or only a Circulation search card place the book on the Library Technician's desk and bring it to his attention.

. Sort the books according to libraries, so that if more than 1 book goes to a library, they can be processed together.

. As you are working with each book do the following things:
a. Check it against author, title and call number given on the form.

b. Be sure all volumes are there that are needed.

c. Bring to the Library Technician's attention if there are any volumes missing or call number does not match or if anything else looks strange to you and you do not feel it is the right book.

d. For a book being sent for reprinting, double check the Circulation card in the back of book to be sure that the book is charged out for three months instead of the 4 week period. If not, have the Library Technician have the card changed with a new date.

e. Hold back any books that are being checked on until the problem has been solved.

f. Put on the Shelf "Books going back to Circulation" any books that are determined wrong.

g. Any book which is in very ppor condition or unusually large size should be checked with the Head of ILL before sending. If it is decided that the book will not be sent, give the form to the Library Technician so that it can be refused and put back on the shelf "Books going back to Circulation ".

h. Be sure any book being checked or specially searched has been charged out. Check the back of book to see if the carbon card is there.

. Type the necessary information on each ILL form. (see attached samples)
a. Sent by--Library Rate should be marked. (Exceptions occur when a library asks us to send the book by air mail, and will reimburse us, or when we send microcard which will fit in envelopes with sending notice. Type 1st class or air mail in these cases.)


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b. Charges--Type "postage"; or if the library is listed on our special no-postage list, type "none" in the blank. The list is encased in plastic and is kept near the typewriter.

c. Insured for-- No insurance when only 1 volume or 1reel is being sent (Unless stated otherwise from Branch Libraries or instructed by Head of ILL)
--$25.00 insurance for each volume or reel when 2 or more items are being sent to the same place.
--$51.00 insurance for a periodical volume, PhD, or MA (per volume)
No insurance for pamphlets being sent for retention.
--$100.00 insurance for Rare Books, unless the Rare Book librarian states other directions
($51.00 is always used instead of $50.00 to identify it in the overy $50.00 category for insurance policy purposes. If 2 volumes(regular) are being sent, the amount $25.00 would be for the first volume and $26.00 on the second volume forms in order to add up to $51.00. If 2 volumes of a PhD were being sent the amount $100.00 would be typed, not $102.00.)

d. Date Sent--Type today's date.

e. Date Due and Restrictions
1. Type "2 weeks from receipt"., unless other directions are given.
2. Occasionally, a branch library or another department will ask that we also mark the "Coping not permited" Box or "library use Only" Box. ( Periodicals, microfilms, and rare books are in "library use only").

f. Renewals
1. The Renewals section at the boom of the form is ordinarily left blank.
2. For all Branch Library books sent, type in capital letters in the Renewals section "NO RENEWALS--BRANCH LIBRARY".
3. Occasionally there will be other reasons for no renewals. (NO RENEWALS--PART OF REFERENCE COLLECTION, or NO RENEWALS--OTHER PATRON IS WAITING).

g. Any special information should be typed in captial letters athe top of the form.
1. PLEASE HAVE PATRON SIGN SIGNATURE SHEET IN DISSERTATION, typed for all dissertations that are loaned. If they ask for allowance to reproduce add: IF A REPRODUCTION IS MADE' PLEASE INDICATE THIS ALSO ON THE SIGNATURE SHEET. PLEASE BE CAREFUL NOT TO DAMAGE THE BOOK.

2. THIS TITLE IS AVAILABLE FOR LOAN, SO WE ARE SENDING IT. IF YOU STILL WISH TO REPRODUCE, PLEASE MAKE IT WHILE YOU HAVE THE BOOK ON LOAN. PLEASE BE CAREFUL NOT TO DAMAGE THE BOOK.

3. YOU HAVE PERMISSION TO REPRODUCE IF YOU WILL TAKE ALL COPYRIGHT RESPONSIBLITY AND WILL NOT HARM OUR VOLUME.

4. EXCEPTION TO POLICY (This policy is typed on type when lending periodicals)

6. Separte the sheets of the form.

a. The top white sheet-Form A- is saved for our files.
1. Staple the original order to the white sheet for all orders that did not come to us on the regular forms.

2. Save this pile on the desk to make statistics.

b. The yellow sheet-From B-is sent to the borrowing library. This is the sending notice.
1. Any note concerning the loan which was too long to type on the top should be typed on a slip paper and attached to the yellow sheet.

LIBRARY NORTHWESTERN UNIVERSITY LIBRARIAN

ADDRESS EVANSTON, ILLINOIS 60201

| Rec'd | Due | Sent | Author & Title | Call Number | Branch |
|---|---|---|---|---|---|
| 9.21.77 | ~~9-19-77~~ | ~~8-23-77~~ | ~~Richter. Sonata 2 volumes~~ | ~~33032 uncatg.~~ | ~~Music~~ |
| | 9-21-77 | 8-25-77 | Vaughan. The works of Thomas Vaughan.. | BF 1601 V34 | |
| | 9-26-77 | 8-30-77 | Modern Irish literature; essays... | PR 8753 M6 | |

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2. Stamp on form in red PLEASE DO NOT USE JIFFY BAGS FOR RETURN OF OUR MATERIAL. (Be careful not to stamp in window area, and for material sent for retention) Stamp pad and stamp are under shelf on Typist II desk.

3. Check to see that the LENDING LIBRARY is the right address. Correct, and write a note at the top noting the change if it is not correct.

4. Mail one red and white label with each yellow sheet. These labels are on the shelf on the Typist II desk. All yellow sheets and labels go in one envelope if there is more than one for a school or institution.

c. The pink sheet-From C- is used as a packing slip and is folded into the book being sent. Some orders do not have a pink slip, check to see that the book has the Wisconsin ownership stamped on the book. If there is not, print lightly in pencil inside the front cover the name of the department or person it belongs to.

d. Sometimes a gold sheet-Form D- is sent along. The requesting library either forgot it or it is the 4th sheet you typed. Any gold sheet should be sent along with the yellow sheet to the library.

e. Often the library has sent a label to use when sending the book.
1. Stampe the label with our address and place it in the book sticking out so shipping room will easily see it.

2. If there is more than one book being sent to the same address, rubber band the books together and use 1 label. Rubber band no more than 3-4 books together. You may send the extra labels back to the school with the yellow notice.

3. Type their address on one of our blank labels if they did not send a notice. Labels will be found on the Typist II desk on the shelf.

4. Paper clip a note to the book to inform the shipping room if the book is to be sent AIRMAIL.

7. Place the books, with labels showing on the shelf "Shipping Room Shelf".

8. Type the library card. (Use yellow slips to hold place you pulled card out)
a. Type the date due in the "Due" column.
1. The usual date due we check to see what date Circulation has put on check out card.

2. For pamphlet being sent for tetention, type RETENTION instead of date due.

3. Books being sent for reprinting, the date due will be three months from sending date, or longer. (Most library cards for these institutions are on the front desk).

b. Type todays date in the the column marked SENT.

c. Type the author's last name and as much of the title as possible. Abbreviate, for PhD, use the author's complete name, the year of dissertation and PhD.

e. If the book is from Branch library, microforms, rare books, documents.. place the dept. name under the Branch column(Example: BIOLOGY, GEOL, GEOG, FILM)

9.Statistics--Use the information from the white sheets--Form A


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a. In the Statistics book, located on the Typist II desk, turn to the front section for this month. Locate, LOANS MADE BY US, find today's date.
   1. Record the amount of books and periodicals being loaned, giving both the amount of volumes and total number of titles

   2. Note in parentheses above the number any special type such as microfilms, pamphlets for retention...etc.

   3. For PhD and M.A. mark the amount of titles loaned and in parentheses above the amount note if there was more than 1 volume.

b. In the insurance section of the statistics record book, make the following entries in BLUE ink.
   1. "Sent" columen-Use Today's date.

   2. "Items" column-Write the amount and kind of items being sent. Examples: 1 per.; 1bk; 2v.Bk; Group all of the items going to one library in 1 entry. Examples: 1per, 1bk; 6bks;

   3. "Address" column-Write the name or acronym of the library to which the items are being sent. (Add RETENTION in parentheseswhen a pamphlet is being sent for retention.)

10. Put the white sheets in the basket for Current Forms for Loans to Other Libraries.

11. File the library cards back into the draw Loan Cards for other Libraries. (Check to see that all titles are recorded in the filebefore filing.)

TWX loan request

a. The first time we will fill these request.
   1. Attach a note to the sending notice or type the message on top of the order you type up Explaining to the other library that we are processing the request as an exception to our policy and that we do not accept TWX requests because the machine is not in the ILL department

   2. On the top of the library card for this school type Notified NO TWX and today's date, as our record that the library has been informed.



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UNIV. OF GEORGIA
CHECKLIST

# ORIENTATION FOR NEW REFERENCE LIBRARIANS

1. Introduction to other reference staff members

2. Tour of the Reference Room
   a. index tables
   b. telephone books
   c. Pandoras
   d. college catalogs -- U.S. and foreign
   e. ready reference shelves
   f. sorting shelves
   g. periodical check-in boxes
   h. University and Community Resources file
   i. University of Georgia pamphlet boxes
   j. Reference shelf list
   k. ready reference file
   l. college catalog check-in file
   m. order file
   n. transfer file
   o. Bibliographic Area (including publishers' catalogs)
   p. folio section
   q. Author-Title and Subject card catalogs
   r. Reference Department manual
   s. clipboard
   t. handout table
   u. location chart
   v. serials computer printout
   w. special location printout
   x. LC subject headings guide
   y. Vertical File
   z. New reference books shelf

3. Tour of the reference work area
   a. Reference desk schedule and bulletin board
   b. supplies
   c. leave forms

   e. explanation of telephone lines, Gist, ILL extension, etc.
   f. shelf reading chart
   g. order baskets
   h. transfer shelves

4. Tour of the library
   a. Circulation/Reserve
   b. Interlibrary Loan -- how to proceed when office is closed
   c. Current Periodicals/Microforms
      (1) explanation of serials catalog
      (2) explanation of newspaper catalog
      (3) location of various microforms and microform readers
      (4) visible file
   d. Copy Room
      (1) cost: 10¢ per exposure (self-service copiers: 5¢)
      (2) long or short paper
      (3) reduction capabilities
      (4) copies from microforms
      (5) color copies


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e. Processing
   (1) LC 1942-62 cumulation
   (2) Supplementary Catalog (order file) -- by title
   (3) OCLC terminals
   (4) standing order files
   (5) series authority file
   (6) vendor file
   (7) Business Office
   (8) Mail Room
   (9) Binding
   (10) Supplies

f. Government Documents

g. Subject floors
   (1) Language and Literature
   (2) History
   (3) Social Sciences and Education
   (4) Fine Arts and Audio Listening Service

h. Special Collections
   (1) Manuscripts
   (2) Rare Books
   (3) Georgiana

i. Electromedia
   (1) Audio Production
   (2) Photographic Services

5. Russell Library

6. Science Library

7. Law Library

REQUIRED READING

1. reference manual
2. UGA Libraries A-Z
3. University and Community Resources File
4. Location Chart
5. ERIC Guide
6. Guides to government documents
7. CRL Handbook

REQUIRED BROWSING

1. Ready reference shelves
2. Index tables
3. List of frequently used reference books
4. Bibliographic Area
5. Bibliographies notebook



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THE NEW YORK PUBLIC LIBRARY
Branch Libraries Memo #48
February 1974

From: Training Handbook for Clerical Supervisors in Public Service Units

## SOME GENERAL PRINCIPLES OF TRAINING*

The capacity to train is a combination of ability and techniques. The following compilation of training techniques should make your instruction of clerks easier and more effective. Many of these guidelines are self-evident, but it is their "obvious" nature that causes them to be overlooked. An occasional review of them will assist you in developing and maintaining a well-trained, efficient, and courteous staff.

A. INDIVIDUAL DIFFERENCES

Always recognize that people are individuals who may differ as to educational background, attitudes, interests, special abilities, personality, etc. Accordingly, you will have to use different supervisory and motivational techniques.

B. MOTIVATION

An important factor in learning is motivation. Praise, acceptance, and approval from supervisors and fellow workers are factors in motivation.

Some important points to remember are:

1. Develop a number of motivational devices (appeals to pride, satisfaction, security, etc.). Some things motivate one person but leave others cold.

2. Stress the importance of the tasks to be learned in relation to the overall operation of the branch.

3. Convey to the clerk that the task is easier and more satisfying when done correctly.



* This unit is based substantially on material adapted from H. Paul Ecker, Handbook for Supervisors, 2d ed., 1970, ch. 6&7.

An unpleasant training experience not only may lead to poorer performance but also may cause a person to transfer feelings about training to other jobs, other supervisors, and even the entire Library.

C. ORGANIZATION OF TRAINING

The most effective training program is one which is well-planned and organized. One useful method, for example, is to teach a group of tasks which normally fall into a meaningful pattern and therefore can be more easily remembered (e.g. all the overdue procedures). The sequence and logic of one task leading to another (vs. isolated and unrelated steps) aid the learning process.

You might:

1) briefly explain the various steps in the overdue process to give the clerk initial perspective

2) next teach each step in the procedure

3) then "reassemble" the steps back into the whole procedure, after each step has been taught, to reinforce the pattern.

D. TERMINOLOGY

As training progresses, make sure that you explain in context all terms, jargons and symbols peculiar to the Library (e.g. "revise," shelf-list," "tracings," "p-slips," "CN"). These terms have little or no meaning to someone new to library work. Your explaining them, as you go along, will make learning more effective and help to "sort out" all other details of the job.

E. SUPERVISOR'S AND CO-WORKERS' EFFECT

Both the supervisor and co-workers have an effect on the training process. Consciously or unconsciously, a clerk is learning an attitude towards the task at hand and toward the entire job. If the supervisor or co-workers have a negative attitude or feel that their work is unimportant to the total goals of the branch, then the clerk will assume that attitude and not perform well.

F. VARYING OF TECHNIQUES

It is a good idea to intersperse reading memos, telling and observation with actual practice by the learner. What the clerk does is more important than what you do, in the learning situation.

G. TEACHING TOO MUCH

Most trainers tend to teach too much at one session. You lose effectiveness if fatigued, and the clerk's rate of learning drops rapidly also.

More efficient learning also takes place if each training session is not too long. Long training periods are unproductive for both you and the person in training.



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H. ENCOURAGEMENT AND CRITICISM

Encouragement or praise can increase a clerk's readiness to learn. Provide encouragement whenever the opportunity presents itself.

In correcting an error, stress the key point, not the failure of the clerk to grasp it. Avoid personal criticism.

I. EXPLAINING THE "WHY"

Explain a procedure not only in terms of what is done but also why it is done to make learning more meaningful and remembered. Certainly the more meaning a clerk sees in new routines, the easier it is to learn them, and the longer they are retained.

You might want to mention that, realistically, some clerical tasks are less pleasant or interesting than others. Stress, however, that these jobs, like all others, are essential to the overall operation of the branch. And you might add that the pleasant jobs are rotated among all members of the clerical staff, insofar as possible.

J. KNOWLEDGE OF PROGRESS

Let the clerk know how he or she is doing. Accurate and complete information concerning the learner's efforts makes it possible to identify successes and errors. In addition to supplying needed information, this "feedback" also provides motivation.

K. ACCURACY VERSUS SPEED

It is better to stress accuracy rather than speed early in the learning process. As skill increases, speed can be built up to what is considered an acceptable standard for the job.

L. TRIAL-AND-ERROR LEARNING

Expect some degree of trial-and-error in any clerk's learning. Do not expect the average person to master new procedures merely by observing you perform them.

M. TRAINER'S KNOWLEDGE OF THE TASK

Because you know how various procedures should be done, they usually appear quite simple and routine to you. Remember that any new task is difficult and also that the new clerk is probably nervous and unsure. Be patient and try to set him or her at ease during the training sessions.

N. QUESTIONS AND FOLLOW-UP

Be available for questions at all times. Always keep the channels of communication open between yourself and those whom you supervise--during training and beyond.

Let clerks know that the branch's staff meetings, held periodically, are occasions for them to raise questions about their work, to receive information about changes in procedure and to provide a forum for general communication.

COLUMBIA UNIVERSITY

FILING TRAINING WORKSHOP

Leader: George Gibbs
Head, Original Monograph Cataloging Department

Tuesday, August 10, 1976

9:30 am .....Introduction and Review of Goals and objectives of the workshop.

9:45 am .....How to file in Columbia University Libraries' card catalogs:

- Background.
- File by the Roman alphabet - show and discuss transliterations.
- File word by word, ignoring initial articles in nominative - discuss "nothing before something", words spelled two ways.
- Disregard modified letters.
- How to file initials, contrasting them with abbreviations.

Wednesday, August 11, 1976

9:30 am .....Summary of material covered in the First Day.

9:45 am .....How to file in Columbia University Libraries' card catalogs (continued):

- When to observe and when to ignore punctuation in filing.
- How to file numbers in titles.
- Order of filing - person, place, subject, title.
- How to file subjects.
- How to file names - forenames, compound forenames, surnames, compound surnames.
- How to file titles.
- How to file cross references, history cards, information cards.
- How to file geographic names and jurisdictions.

11:45 am.....Evaluation.



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## Your Personal Objectives

Evaluation of a training program is most effective if it can be made in terms of objectives or goals originally selected by the participant.

The accompanying chart provides a means for you to select your personal objectives before the program begins. At the end of the workshop and again in several months, you will have an opportunity to measure the extent to which these objectives were achieved.

Your care and thoughtfulness in completing the chart will be most helpful to you and to the planners of the workshop: You will be able to see how much you gained from the course, and we will have valuable guidance in refining and developing the program.

First, place a check mark beside the objectives which are important to you and then follow instructions to indicate the degree of their importance to you.

After the workshop is over, you will be asked to complete the evaluation chart in terms of the "degree of fulfillment," the extent to which each objective was fulfilled.



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a.

FILING TRAINING WORKSHOP

Your Name _____

Objectives

A. Check only those that are important to you. (Ignore those that are not)

B. Weight each checked objective.*

Be able to:

1. File correctly in the card catalog.
2. File faster in the card catalog.
3. Teach staff to file cards correctly into the card catalog.
4. Teach staff to file faster in the card catalog.
5. Exchange ideas with other participants in the workshop.
6. Solve filing problems faster and more easily.
7. Have experience in the workshop filing cards that will be useful to me when filing in my card catalog.
8. Identify correctly cards coming from Card Production and handle them properly.
9. Teach staff to identify correctly cards coming from Card Production and handle them properly.
10. Identify particularly difficult filing areas and learn how to file correctly into them.
11. Know how to resolve card problems.
12. Evaluate this pilot workshop in terms of its value for training staff to train filers.
13. Determine what kinds of problems exist in departmental card catalogs.
14. Get away from my library for a few hours.
15. Other.

(If you checked only one objective, assign all 100 points to it; if you checked two objectives, spread the 100 points between them, etc.

8 unsatisfactory; 1-2 poor; 3-4 below average; 5 average; 6 above average; 7 good; 8 very good; 9-10 excellent.

| ✓ | 1. Degree of Importance *Weight each checked objective for its importance to you, allocating EXACTLY 100 POINTS AMONG ALL OF THOSE YOU CHECK. A total of 100 points must be assigned. | 2. Degree of Fulfillment **Rate each objective from 0 to 10 to indicate how well it was fulfilled. | 3. Index of Obj. Fulfillment. |
|---|---|---|---|
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STAFF DEVELOPMENT PROGRAM EVALUATION FORM

Program Title Filing Training-Pilot Workshop Date May 19 & 20, 1976

Location 410 Butler Leader(s) DAVID GARNES, GEORGE GIBBS

Listed below are a series of statements and questions concerning the program you have completed. We would like to have your reaction to each one of these items.

Please read each item and decide how you feel about it and then circle the number corresponding to your reaction. There are no right or wrong responses, only your own personal reactions.

| CONTENT EVALUATION | To a very great extent | To a considerable extent | To some extent | To a very little extent | To no extent |
|---|---|---|---|---|---|
| 1. To what extent was the level of material presented in this program understandable? | 5 | 4 | 3 | 2 | 1 |
| 2. To what extent did this program hold your interest? | 5 | 4 | 3 | 2 | 1 |
| 3. To what extent can you use the skills/knowledge learned from this program on the job? | 5 | 4 | 3 | 2 | 1 |
| 4. To what extent were you aware of what the program would contain beforehand? | 5 | 4 | 3 | 2 | 1 |
| 5. To what extent has the program met your own expectations? | 5 | 4 | 3 | 2 | 1 |
| 6. To what extent were the facilities adequate? | 5 | 4 | 3 | 2 | 1 |

7. How did you feel about the length of the session? (Please circle)

Too long About right Not long enough

| 8. I would recommend this program to other staff members. (Please circle) | Strongly Agree | Agree | Undecided | Disagree | Strongly Disagree |
|---|---|---|---|---|---|



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FILING - LEADER EVALUATION

| | Extremely effective | Considerably effective | Somewhat effective | Marginally effective | Not at all effective |
|---|---|---|---|---|---|
| 1. How would you rate the teaching methods used in this program? | 5 | 4 | 3 | 2 | 1 |

| | Strongly Agree | Agree | Undecided | Disagree | Strongly Disagree |
|---|---|---|---|---|---|
| 2. The leader had a thorough knowledge of the subject. | 5 | 4 | 3 | 2 | 1 |
| 3. The leader's delivery was understandable. | 5 | 4 | 3 | 2 | 1 |
| 4. The leader was well organized. | 5 | 4 | 3 | 2 | 1 |
| 5. The leader was able to relate the activities in the program to your job. | 5 | 4 | 3 | 2 | 1 |
| 6. The leader spent enough time covering each area. | 5 | 4 | 3 | 2 | 1 |
| 7. The leader answered questions sufficiently. | 5 | 4 | 3 | 2 | 1 |
| 8. The leader covered the material in sufficient depth. | 5 | 4 | 3 | 2 | 1 |

| | To a very great extent | To a considerable extent | To some extent | To a very little extent | To no extent |
|---|---|---|---|---|---|
| 9. To what extent were the objectives set by the leader fulfilled? | 5 | 4 | 3 | 2 | 1 |

What did you learn from this program which will be most useful to you on the job?

If the following were added, this program would be more useful to me on the job.

What was of least value to you in this program?



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EXCERPT FROM: STAFF PERFORMANCE EVALUATION PROGRAM

AT THE MCGILL UNIVERSITY LIBRARIES

## INTRODUCTION OF NEW STAFF TO PERFORMANCE EVALUATION

### I INTRODUCTION TO THE JOB

On the first day of work on a new job, the supervisor will ensure that the new staff member is given a tour and some orientation in the specific library, as well as a copy of his/her own job description. This provides a background with which to begin actual on-the-job training. New staff members are expected to familiarize themselves with the existing manuals of procedures and departmental regulations affecting their positions. Also, it should be conveyed to the new staff member the requirement to interact with other staff members in a manner that is conducive to the unit successfully meeting its goals.

### II INTRODUCTION TO THE UNIT GOALS AND STANDARDS OF PERFORMANCE

The new staff member should be made aware of the unit goals and performance standards shortly after joining staff. A short group meeting including all members of the unit may be a useful way of achieving this.

### III SETTING OF PROBATION PERIOD GOALS AND STANDARDS

At the end of the first or second week an interview should be held for setting individual goals and standards for the new staff member, keeping in mind the complexity of the job and the time required to gain proficiency. The timing for the establishment of librarians' individual goals should be coordinated with the reviews required by the Appointment Procedures for Librarians.

In establishing goals and standards, a satisfactory level of work habits is assumed, while in some instances they may be specifically stated, e.g. compatibility, responsibility, cooperation, adherence to departmental regulations, etc. The goal of learning the basic elements of the job will probably take precedence over the other goals during the probationary period.

During the probationary period, the supervisor should make sure that the new staff member understands instruction and training as it progresses and encourage the staff member to make known any difficulties he/she may be having at this time.

In the case of supervisors, goals and standards should include giving direction (e.g. are instructions always clear, easily connected with work assignments, or explaining policies, etc.); training (e.g. is necessary patience and perseverance demonstrated when training staff on new duties); judgement (e.g. is objectivity usually shown when analysing abilities of staff, are recommendations usually sound)?

/...



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IV PROBATION REPORT/REVIEW OF GOALS AND STANDARDS

At the end of 2-2½ months, the goals and standards for Library Assistants should be reviewed for a Probation Report. The timing for the review of goals and standards for new Librarians should be coordinated with the reviews required by the Appointment Procedures for Librarians.

Supervisors must recognize that the probation period is one for learning about the job and the environment and that a new employee should not be expected to work at maximum potential one week after starting. Probably supervisors should look for progress during the probation period and might look for an acceptable level of performance at the end of the period. When the report is completed and it is determined that the probationary period is completed, then goals and standards should be established.

V ESTABLISHMENT OF FIRST GOALS AND STANDARDS FOR THE ANNUAL EVALUATION

The procedure should then be followed for the establishment or formulation of individual goals and performance standards in keeping with the goals and standards of the unit.



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McGILL UNIVERSITY LIBRARIES

*TO BE RETURNED TO THE LIBRARY PERSONNEL OFFICE NO LATER THAN* _____

## PROBATION REPORT - LIBRARY ASSISTANTS

Name _____ Position _____

Library/Department _____ Date Employed _____

When this staff member was hired, he/she was informed that there would be a probation period of three months (60 working days). As the end of this period is approaching, we would ask you to complete this form to record your evaluation of his/her performance. The intent is to review performance against the goals and standards which were discussed with the staff member when he/she began work and to indicate where improvement is needed. After completing this form you should review the performance with the staff member to share your perspectives and gain his/her perspectives.

In those instances when performance has been unacceptable, you should make a judgement whether probation should be extended or whether employment should be terminated. This judgement may be influenced by your discussion with the staff member in which you will want to determine the factors which have contributed to unacceptable performance and whether these factors can be changed. While you will wish to be honest and fair with the staff member, if you have little hope for improvement, termination may be in the best interst of both the staff member and the library.

I. EVALUATION SECTION

Describe briefly the staff member's level of success in achieving his/her performance goals during the probation period. What have been the contributing factors? Consider progress in learning the basic elements of the job, work load, work habits, organizational obstacles, amount of supervision available, amount of training provided, etc. In the case of supervisory staff, consider also indications of capability in giving direction, training, judgement of subordinates. Be as specific as possible. Indicate areas where improvement is expected and how it can be effected.



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II. RECOMMENDATION

Do you recommend that:

(a) This probationary staff member be continued as a permanent staff member? _____

(Work should now start on establishing individual goals for annual evaluation)

(b) Probation be extended for a further trial? _____

If so, how long? _____

ACTION PLAN

Indicate what specific improvements are required and what steps can assist in achieving the improvements, e.g. revise goals, investigate training, change work procedures, shift work priorities, etc.

Signature of staff member _____

(c) The staff member be released? _____

Termination date _____

Appraisal made by _____ Date _____

Librarian or Department Head in charge _____ Date _____

**SAMPLE PAGES FROM THE PROGRAMMED FILING TEXT**

**NOW IN PROGRESS**

Based on filing rules used in the Rutgers
Union Catalog ( combination of ALA 1942 and 1968)

Included: directions for using the manual

pages from section on the kinds of cards

pages from sedtion on the ALA rules

Christopher Irwin

Catalog Services

Rutgers University Libraries

Jan. 19, 1978

## HOW TO USE THIS MANUAL

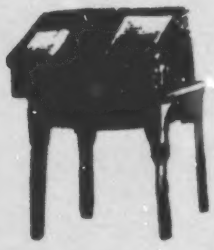
As soon as you turn the page you will notice that this is not an ordinary book. You will see that it consists of numbered "frames" rather than pages, and that instructions are included in each frame as to what frame to go to next.

This is a programmed text. You will not be reading it cover-to-cover, nor will you be reading all of it.

What you will do is interact with the book. It will pose questions to you as you go along, and the answers you supply will determine what path you will follow through the text. If you answer a particular question incorrectly, you will be guided to more explanation of the topic and then back again to the original question. If, in your choice of answers, you indicate that you don't understand the reasons behind the correct choice, you will be steered to further examples of the topic discussed. On the other hand, if you answer a question correctly the first time, you will be guided immediately to new material.

Several frames in this manual will ask you to write down information, so have a pencil and paper handy.

Finally, this manual is not intended to be an exhaustive list of filing rules. For questions on detail not covered consult the 1969 ALA Rules for Filing Catalog Cards.





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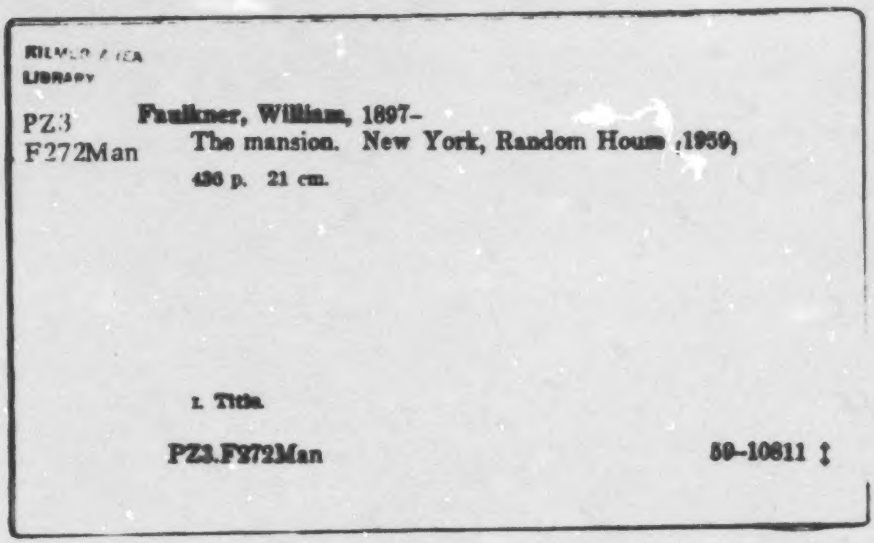
1. Every book in the library system is represented by a set of cards; each card in the set is headed with a different piece of information about the book-- that is, different *entries*. The more entries in the catalog there are for a particular book, the more accessible it is.

Every book has at least a *main entry* card. The *main entry* is the heading under which the book is cataloged; it may be a personal author, a corporate author, or a title. It is usually printed directly to the right of the first line of the call number.

For example:




This main entry is a _____.

a. Corporate author . . . *Go to frame 4*

b. Personal author . . . *Go to frame 3*

c. Title main entry . . . *Go to frame 5*

---

2. *It's possible that a book might be titled "Ford Foundation" but in that case the main entry would be the author, not the title. Remember: the author is the person or body responsible for the intellectual content of the work.*

*Go back to frame 3 and try again.*



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3. *This answer is correct.*

Notice that the entry is made under the last name of the author. This is standard form. The main entry is made for a personal author if that author is the person responsible for the intellectual content of a book. If there are two or three authors, the main entry is made under the first one given credit in the book. If more than three collaborate on a work, the main entry is made under the title. The following card is an example:

Q125
.R53

The Rise of modern science. General editor: A. Rupert Hall. [New York, Harper, 1962-
v. illus. 22 cm.

Includes bibliography.

CONTENTS.-
2. The scientific renaissance, 1450-1630, by M. Boas.

1. Science - Hist. I. Hall, Alfred Rupert, 1920- ed.
ED7-23-62 SJ M bw

Books put out by an official body, or published in its name or by its authority, will be given a "corporate author" main entry. This author need not strictly be a corporation; it could be any society, institution, group, government department, bureau, or organized body.

Here is an example:

PB36
.F6

**Ford Foundation.**
Language development; selected papers from a Ford Foundation conference on the state of the art. [New York, 1968]

63 p. 23 cm.

Includes bibliographies.

1. Languages, Modern—Study and teaching—Congresses. I. Title.

PB36.F6 407 68-57731

Library of Congress

Here "Ford Foundation" is the _____.

a. title of the book . . . *Go to frame 2*
b. author of the book. . . *Go to frame 7*
c. I don't know . . . . . *Go to frame 6*

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4. *No, take a closer look at the top line on this card--the one printed here in bold letters: this is the author line.*

*Go back to frame 1 and choose another answer.*

---

5. *This answer is incorrect. It's conceivable that a book could be titled "Faulkner, William, 1897- " (though unlikely) but in that case the main entry would be the author of the book.*

*Go back to frame 1 and choose another answer.*

---

6. Let's look at it again.

Notice that "Ford Foundation" is the first line of the body of the card, reading from the top, and it's printed directly across from the first line of the call number. These are both clues that the card is a main entry. Is the main entry here a title? Ask yourself who the author would be if it were a title. Look further down on the card at the indented line following the main entry; does this sound like an author or a title?

*Go back to frame 3 and choose another answer.*

---

7. *Yes, this is a corporate author main entry. In this case "Language development" was published under the auspices of the Ford Foundation. So regardless of who did the actual putting of words onto paper, the Ford Foundation is considered the author because they bear the responsibility for the content.*

In addition to the main entry, *added entries* are created for most books. These are cards exactly like the main entry except for one difference: an extra added line is printed at the top of the card, bearing another piece of information about the book.

The following card is an example:


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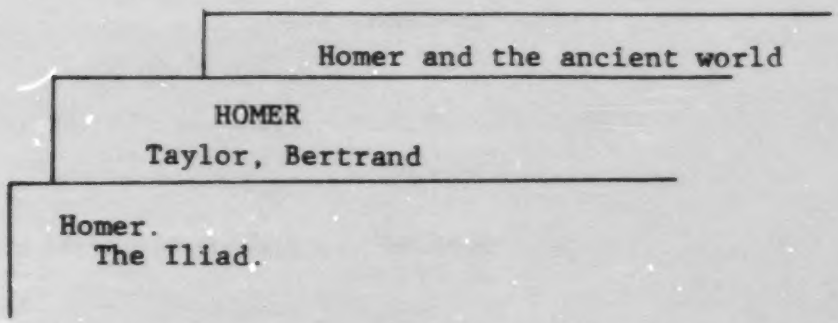
30. In addition to alphabetical order and the "nothing comes before something" rule, there is one other general pattern you have to know: *works BY an author come before works ABOUT an author.*

It works this way--




First come works by Homer, and then come works about him. Of these, notice that subject cards come first, and then title beginning with the word "Homer."

*REMEMBER: AUTHOR--SUBJECT--TITLE.*

Which of the following headings would you file first? Second?

Miller and Durrell: a critical appraisal

MILLER, HENRY, 1891-

Miller, Henry, 1891-
The air-conditioned nightmare

*Go to frame 32.*

---

31. *Remember: headings typed in all-caps are subject headings. If the subject is a person's name, it represents a book in some way <u>about</u> the person, and must come after that name as a main entry (a book <u>by</u> that person.)*

*Try again: which comes first? Which second?*

Verne, Jules, 1828-1905
Around the world in eighty days

Verne, Jules, 1828-1905
Vingt mille lieues sous les mers

Verne: the world's first science-fiction writer?

VERNE, JULES, 1828-1905.

*Go to frame 34.*



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32. *The correct order for these entries is:*

Miller, Henry, 1891-
The air-conditioned nightmare

MILLER, HENRY, 1891-

Miller and Durrell: a critical appraisal

*If you got these correct, go to frame 33. If you made a mistake go to frame 31.*

---

33. Now let's get into the details of filing--specific rules from the ALA Rules for Filing Catalog Cards. These rules get fairly detailed, but you must have a basic knowledge of them for any kind of library work, or even if you just want to be able to use libraries in more than a hit-or-miss way.

Here we go.

1) Personal authors are arranged before all other entries beginning with the same word used in any other way.

That is,

White, Adam
White, Tom
White brothers
White coats
WHITE FAMILY

2) Corporate authors (remember: this means any kind of business or organization, not necessarily a true corporation ) are filed alphabetically with other types of headings.

For example,

Ford, Harold
Ford Foundation
FORD FOUNDATION
The Ford Foundation and research
Ford Foundation. Grants Division.

Now, imagine that the following headings are on cards in a catalog drawer and you are filing a card with this heading:

Lloyd George Adams Library

Where would you file it among the following list of cards-- location (a), (b), or (c)?

*Continued on next page.*



053

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33 CONT.

.....(a) *Go to frame 35*

Lloyd, William

Lloyd Brothers, Cincinnatti

LLOYD FAMILY

.....(b) *Go to frame 37*

Lloyd George, David

.....(c) *Go to frame 38*

LLOYD GEORGE FAMILY

---

34. *The correct order for these entries is:*

Verne, Jules, 1828-1905.
Around the world in eighty days

Verne, Jules, 1928-1905
Vingt mille lieues sous les mers

VERNE, JULES, 1828-1905

Verne: the world's first science-fiction writer?

*Got it?*
*Just remember-- AUTHOR ... SUBJECT ... TITLE.*

*Now go back to frame 33*

---

35. *You chose location (a)-- before* Lloyd, William. *This is not correct. You know that "Lloyd" is a last name here, because it's followed by a comma. "Lloyd" in the card you're filing is a first name. Revue the rules in frame 33 and select another answer.*

*Go back to frame 33*

---

36. *The correct answer is (b). "divided" falls alphabetically between DESCRIPTION and EAST. With place names, we ignore the rule that would ordinarily place titles after subject headings beginning with the same words.*

*Go to frame 39*



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37. *You selected location (b)-- between "LLOYD FAMILY" and "Lloyd George, David." This answer is incorrect. You probably reasoned that "Adams" comes alphabetically before "David." This is true, but "Lloyd George" in "Lloyd George Adams" is not a person's last name (surname), and must come after entries where these words are used as a surname.*

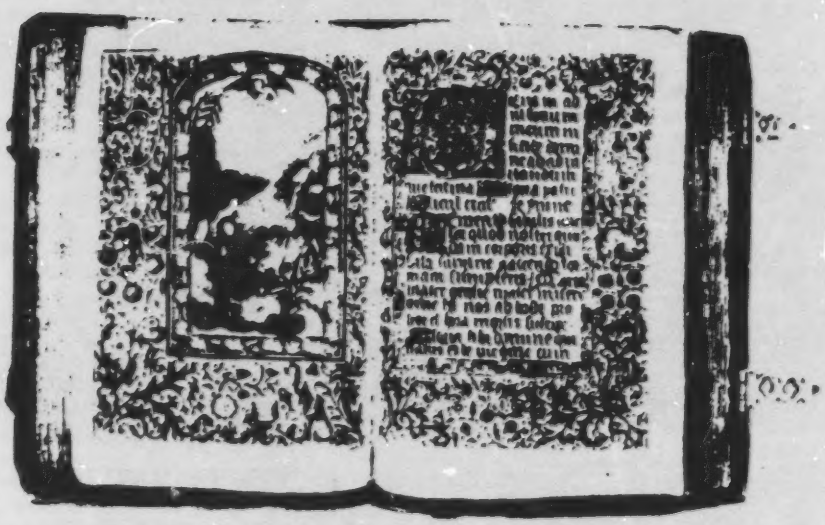
*Go back to frame 33 and try again.*

---

38. *Very good.*
*"Lloyd George Adams" comes after "Lloyd George" used as a surname, and falls alphabetically before "LLOYD GEORGE FAMILY."*

3) **Place names** are filed after personal authors, and are alphabetically interfiled (regardless of punctuation) with all other types of entries.

*Continued on next page.*





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# CAN YOU REALLY READ OUR CALL NUMBERS?

TAKE THE SELF DIAGNOSTIC TEST. (Do not include your name but please return the test to the Circulation Desk.)

PLEASE PLACE THE APPROPRIATE NUMBER (the one above the call number) IN THE CORRECT ORDER IN THE BLANKS PROVIDED.

| | (1) | (2) | (3) | (4) | (5) |
|---|---|---|---|---|---|
| EXERCISE #1 | DA506 | DA506 | DA506 | DA506 | DA506 |
| — — — | W7A3 | W2A13 | W7K4 | W7A3 | W2A4 |
| — — | v.2 | 1963 | | v.1 | 1973 |
| EXERCISE #2 | PR6045 | PR6045 | PR6045 | PR6045 | PR6045 |
| — — — | A34R6 | A334W5 | A334R4 | A339Z5 | A34S5 |
| — — | | | | 1969 | |

Please do not change your answers. Just check to see if you are right or wrong. If you were wrong please pick up the instruction sheet "How to Read Library of Congress Call Numbers" at the Circulation Desk.

ANSWERS: EXERCISE #1: 2,5,4,1,3. EXERCISE #2: 3,2,4,1,5.



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# HOW TO READ LIBRARY OF CONGRESS CALL NUMBERS

As Library of Congress call numbers use letter(s), whole numbers, letter(s), and decimal numbers, they can be confusing. In reading a call number you read from the top line down and each line from left to right just as you would read a book.

Starting with the letter(s) at the top left of the call number books are arranged alphabetically:

(Thus: A AC AG AZ B BC . . .)

Books having the same letter(s) on the top line are all shelved together by the number group that follows the letter(s). THESE NUMBERS ARE ARRANGED NUMERICALLY, NOT DECIMALLY:

(Thus: F1 F21 F75 F101 F175 F200 F201)

When both the letter(s) and the number group that follows are the same, then books are shelved alphabetically by the next letter:

(Thus: QM23 A, QM23 B, QM23 C, QM23 D, QM23 E . . .)

And finally, books which are identical in the first letter(s), the number group that follows, and the second letter, are then shelved by the next number group. THESE NUMBERS ARE ARRANGED DECIMALLY, NOT NUMERICALLY:

(Thus: QM23 E6543, QM23 E778, QM23 E88, QM23 E9 . . .)

There should be a decimal point after each E in the line above to indicate that the number that follows is a decimal number. But there isn't. This INVISIBLE DECIMAL POINT takes some practice to "see".

Please put the following call numbers in order by placing the appropriate number in each of the boxes

| exercise #1 | HF5547 D65 | HF5547 D398 | HF5547 D62 1960 | HF5547 E45 | HF5547 D62 |
|---|---|---|---|---|---|
| | ☐ | ☐ | ☐ | ☐ | ☐ |



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The answers for exercise #1 are upside down at the bottom of this page. Please check your answers and if you have any problems please review the first page and try the exercise again.

Remember that when reading a call number from top to bottom and each line from left to right that nothing comes before something. That is

| | | | |
|---|---|---|---|
| DS668 | comes before | DS668 |
| B39 | | B39 |
| | | 1954 |

exercise #2

| | | | | |
|---|---|---|---|---|
| PR6045 | PR6045 | PR6045 | PR6045 | PR6045 |
| A34R6 | A334W5 | A334R4 | A339Z5 | A34S5 |
| | | | 1969 | |

☐ ☐ ☐ ☐ ☐

The answers for exercise #2 are at the bottom of the page. Remember that the numbers in the second line are decimal numbers.

Occasionally you will find call numbers in which there is a chronological year as part of the subject. In that case it will come before the second letter which is followed by decimal numbers. Please do exercise #3 remembering that dates are arranged in chronological order.

exercise #3

| | | | | |
|---|---|---|---|---|
| HB3717 | HB3717 | HB3717 | HB3717 | HB3717 |
| 1857 | 1837 | 1857 | 1873 | 1857 |
| V3 | M3 | E82 | S36 | V3 |
| | | | | 1967 |

☐ ☐ ☐ ☐ ☐



SOLUTIONS: exercise #1 4,1,3,5,2 exercise #2 4,2,1,3,5 exercise #3 3,1,2,5,4

RESPONSES TO SPEC SURVEY ON TRAINING FOR ROUTINE TASKS

| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY * (through SPEC, from library, costs, etc.) |
|---|---|---|---|
| **U. OF ALABAMA (EXIR BRENNAN 205-348-4606)** | | | |
| **Pre-order verification** | **X** | **Single sheet** | **One copy at no cost** |
| **Card ordering information** | **X** | **Single sheet, color-** | **N.A.** |
| **Basic filing rules** | **X** | **Booklet coded** | **N.A.** |
| **Procedures for ordering materials** | **X** | **Booklet** | **N.A.** |
| **Operations and procedures manual for Education Lib.** | **X** | **Booklet** | **Multiple copies at regular ILL rates** |
| **Operations and procedures manual for Reserve room** | **X** | **Booklet** | **N.A.** |
| **U. OF ARIZONA (J. ROBERT ADAMS 602-884-2101)** | | | |
| Filing by our modified LC rules in our author/title catalog | x | Computer based PLATO instruction. (50 minutes) | Libraries with access to PLATO through the University of Illinois system can look up lessons: course name: azlib student name: sam password: sam |
| Subject filing | | " (40 minutes) | |
| ALA filing rules | | " (30 minutes) | |
| **ARIZONA STATE U. (HELEN GATER 602-965-3417)** | | | |
| Bibliographic Checking of Order Requests | X | Manual | SPEC |
| Acquisitions Procedure for Standing Orders | X | Manual | SPEC |
| Acquisitions Receiving Area Procedures | X | Manual | SPEC |
| Handbook for use by faculty who serve as Library Representatives for their departments. | X | Handbook | SPEC |
| Cataloging Manual for Monographs | X | Manual | from library at copy cost |
| Processing Manual for Marking Procedures and Binding (Primarily for Monographs) | X | Manual | from library at copy cost |
| Arizona State University Library Map Service Procedural Manual (Classification and indexing of maps and charts, along with proper code sheet format for computerized Map Index.) | X | Manual | Applicable only to local system. |



*CONTACT SPEC OFFICE FOR MATERIALS AVAILABLE FROM SPEC

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| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc.) |
|---|---|---|---|
| **BRIGHAM YOUNG U.** (Sterling J. Albrecht - 801-374-1211 ext. 2905) | | | |
| General Reference Training Harold B. Lee Library | x | Manual | SPEC |
| Filming Manual | x | " | SPEC |
| Truck Stamping Manual | x | " | SPEC |
| Filing Manual | x | " | SPEC |
| Manual for Typing Different Editions & Coorporate Entries | x | " | SPEC |
| Catalog Maintenance | x | " | SPEC |
| General Labeling | x | " | SPEC |
| Serials | x | " | SPEC |
| What to do with Law Library Cards | x | " | SPEC |
| Policies & Procedures for Clerical Employees of the Catalog Department | x | " | SPEC |
| **U. OF CALIFORNIA -- BERKELEY** (Richard F. Larson - 415-642-3773) | | | |
| Introduction to Use of the Catalogs and to Bibliographic Identification | x | Training Material | SPEC |
| Use of Library Catalogs & Principles of Bibliographic Identification | x | Manual | SPEC |
| Payroll Procedures | x | " | SPEC |
| Datapoint Keying: orders and a brief catalog listing | x | " | SPEC |
| Marking and Call Number Labeling | x | " | SPEC |
| **U. OF CHICAGO** (Jane Marshall - 312-753-2931) | | | |
| Serials Procedures | x | Manual | SPEC |
| Analytics Procedures | x | " | SPEC |
| Introduction to Card Catalog & Filing Procedure | x | " | SPEC |



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| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc.) |
|---|---|---|---|---|
| **COLORADO STATE U.** (Robert Burns - 303-491-5911) | | | | |
| Specific: | | | | |
| Bibliographic Searching | X | | Loose leaf-manual | From Library |
| Acquisitions | X | | " " | " |
| Shelving | X | | " " | " |
| Loan Desk | X | | " " | " |
| Filing In Card Catalog | X | | " " | " |
| Library Technician in Social Sciences Dept. | X | | " " | " |
| Used Listening Room and Microtext Materials | X | | " " | " |
| Cataloging | X | | " " | " |
| Special Collections | X | | " " | " |
| General: | | | | |
| Introducing the Depts of CSU. Orientation Committee 1972 | X | | Xeroxed Manual | " |
| Sound/Slide Program For Orientation of New Employees | X | | Slides (20 minutes) | " |
| CSU Library-Ese: A Glossary of Initialisms, Terms, Acronyms, Phases, etc. CSU Libraries Pub. No. 17, 1975 ED 129239 | X | | Manual | ERIC |
| **COLUMBIA U.** (Joyce Veenstra - 212-280-5367) | | | | |
| **Training filers to file** (workshop) | xx | | Handouts, Filing rules, use of overhead projector Sets of cards for filing | Through SPEC. (The Filing Rules are local and COMPLEX and would not be of much help to another library, thus they are not enclosed) |
| **Paging and shelving** | xx | | Slide show * | |
| **There are several procedural manuals available to train staff in local procedures in various cataloging routines, circulation procedures, etc. but it would be costly to reproduce them, and I don't know how helpful they would be out of the local situation.** | | | | |

* If you would like to pay for a copy of the slide show, we would be happy to send you a copy to sell, loan, rent, or whatever, but we don't have the staff or the money to reproduce and handle distribution ourselves.



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| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc.) |
|---|---|---|---|---|
| **U. OF CONNECTICUT** (Sheila Creth - 203-486-2219) | | | | |
| Shelving Operation | x | | use of actual library materials (books, journals) plus student handbook as supplementary information as well as specific hand-outs developed on shelving operation. | distributed to other libraries upon request |
| Consideration in Planning Training for New Employees | x | | Train the Trainers material | SPEC |
| **EMORY UNIVERSITY** (Paul Cousins, Jr. - 404-329-6861) | | | | |
| Inventory Procedures | x | | Manual | |
| Instruction for Shelving in Documents Center | x | | Manual | |
| **FLORIDA STATE U.** (Alice Moore - 904-644-5579) | | | | |
| Procedural manuals in all areas | x | | Manuals | |
| Automated listing manual for Serials | x | | | |
| Solinet training tapes & manual | | x | Manual | Solinet |
| Keypunch manual | | x | Manual | |
| Tagging manuals | x | | Manual | |
| BATAB procedures manual | | x | Manual | |
| Manual for data entry terminal, Acquisitions | | x | Manual | |
| **GEORGETOWN UNIVERSITY** (James DeLancey - 202-625-4095) | | | | |
| Reserve Services Operations Circulation Department | x | | Manual | |
| Holds & Searchs | x | | Manual | |
| Government Documents Dept. Procedures | x | | Manual | |



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|---|---|---|---|---|
| U. OF GEORGIA (Warren N. Boes - 404-542-2716) | | | | |
| Inputing and updating machine-readable data on a cathode ray tube terminal. | X | | Manual | Not generally available for sale; |
| Public service for Government Documents. | X | | Manual | " |
| Processing for Government Documents | X | | Manual | " |
| Circulation desk procedures | X | | Manual | " |
| Shelvers routines | X | | Manual | " |
| Student assistant duties for Circulation | X | | Manual | " |
| Checklist for circulation desk trainers. | x | | One sheet (approx. 30 items to noteafter after initial training completed). | Being revised |
| Checklist for Reference desk trainers. | x | | Used by trainer to determine in discussion with new employee, that basic procedures have been covered. | Not generally available, SPEC |
| HARVARD UNIVERSITY (Cynthia Carlin - 617-495-3721) | | | | |
| Personnel Procedures for supporting staff | x | | Supervisor's mini-manual | From library - free |
| (HARVARD cont'd next 3 pages) | | | | |



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Administration

Director's Office - None
Personnel Office
Librarian's Handbook
Supervisor's Mini Manual
Officers of Harvard University - Appointment Form Instruction Manual
Business Office - None (Door Checker Manual forthcoming)
Photographic Services - informal
Microtext
formal (out of date)
Student Assistant Manual
Building Services - None

Cabot Science Library

Public Services Manual
Guard Manual
Student Assistant Manual
Circulation Assistant Manual
Supervisor Manual
Serial Assistant Manual
Reference Slide-tape - "How to Process Books?"
Bibliographic instruction in Biology Abstracts Slide/tape

Cataloging & Processing Dept.
Filing - formal - 82 pp. & cards
Pre-Cat. - out-of-date. 100 pp.
Shelflist - out-of-date since LC
Typing - out-of-date - 70 pp.
Serial Records - None
Serial Cataloging - formal, approx. 75 pp.
OCLC - written documentation of a wide variety
OCLC Terminal Manual

Collection Development - only informal

Fine Arts Library

Book Catalog - typing guide & directions on cards - 50 cards
Filing Manual - 22 pp.
Periodical Transfer Procedure Manual
Serial Records Procedure Manual - 20 pp.
Visual Collections Filing Manual - 20 pp.
Seven formal mini-manuals with cartoons
1. Introduction to Classification Systems, 21 pp.
2. So you want to get paid - how to complete time slips, 10 pp.
3. How to close the Library, 3 pp.
4. How to charge a book, 14 pp.
5. How to cancel a book, 12 pp.
6. Use of Fine Arts Library by Visiting Readers, 5 pp.
7. Overdue Procedures, 5 pp.

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1 April 1977

HARVARD UNIVERSITY

Harvard-Yenching Library

Librarian's Office
Harvard-Yenching Office Manual. 4 pts.
1. General Administration
2. Employees
3. Endowments and Reports
4. Budetary
60 p. approx.

Cataloging Dept. Manual, 100 pp.
Korean Section - informal handwritten notes, 5 pp.

Hilles Library

informal - procedures folders, Circulation
Shelvers
Acquisitions

Houghton Library

informal

Lamont Library

ALA Filing rules
Reserves "How to" Manual
Reclass manual

Littauer Library

Technical Services Manual, 31 pp. - out-of-date
Filing Manual

Hebrew Dept. - informal - Uses Cataloging Dept. Filing Manual

Middle East Dept.

Informal filing manual
Organizational Chart



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HARVARD UNIVERSITY

Public Services

Interlibrary Loans - informal
Circulation - informal (Student Manual forthcoming)
Reference - Reference Manual, loose leaf, 40 pp.
Stack Div. - Staff Manual, 35 pp. current
Library Priviliges - "Library Priviliges Procedural Manual", 6 pp. current
Periodical Room - "Periodical Room Manual", 20 pp. out-of-date, revision forthcoming
Map Collection - informal

Slavic Dept.

Typing Manual
Acquisitions Manual
Cataloging Manual
Uses Catalog Dept. Filing Manual

Systems Planning

Keypunchers Manual, 40 pp.
Editors Manual, 40 pp.

| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc.) |
|---|---|---|---|---|
| **U. OF HAWAII (H. Kathee Hoover - 808-948-7853)** | | | | |
| "How to read Library of Congress call numbers" (shelving and shelfreading) | x | | Photocopy hand-out | |
| Four flowcharts of various Serials Division procedures (extracted from procedures manual) | x | | " " " | |
| **U. OF HOUSTON (Marvine Brand - 713-749-4241)** | | | | |
| Filing in Public Catalog | | X | ALA Rules for Filing Catalog Cards, 2d ed. 1968 | |
| Computerized on-line Cataloging | X | | Manual | (being revised) |
| Policy and Procedure Manual for Cataloging Department | X | | Manual | (being revised) |
| Circulation Procedures | X | | Manual | (being revised) |
| CLSI Manual for Data Entry in Circulation and Cataloging. | | X | Manual | |
| Shelving (How to Shelve Books) | X | | Manual | (being revised) |
| Inventory of Books | X | | Manual | (being revised) |
| **INDIANA U. (Ann Beltran - 812-337-3403)** | | | | |
| Lilly Library's Reader Services Manual for Students | x | | Manual | SPEC |
| **IOWA STATE (Paul Gherman - 515-294-2445)** | | | | |
| Pulling Card Sets | X | | photocopy | Available at cost of reproduction |
| Filing Rules for Title Arrangement of Order File | X | | photocopy | Available at cost of reproduction |
| Card Catalog Checking | X | | photocopy | Available at cost of reproduction |



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| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc.) |
|---|---|---|---|---|
| **JOHNS HOPKINS U.** (David Stam - 301-338-8325) | | | | |
| Kent St. OCLC Tapes | | x | Video Tape | |
| Solinet OCLC Audio Cassettes | | x | | |
| Cataloging Manual | x | | (now out of date to some extent) | |
| Filing Brochure | x | | | |
| Binding Manuals (several in preparation) | x | | | |
| Reserves Manual (in prep.) | x | | | |
| UGL Student/Asst. Desk manual | x | | | |
| **JOINT UNIVERSITY LIBRARIES** (Keith Cottam - 615-322-2837) | | | | |
| Govt. Docs. materials processing | X | | Manual | None |
| Education Library | | | | presently |
| Reference | X | | | |
| Circulation | X | | | available |
| Curriculum Lab. | X | | Manuals | |
| Music Library | X | | | for loan. |
| Library Science Lib. | X | | | |

**U. OF KENTUCKY** (Faith Harders - 606-257-3801)

1. Central Serial Records Manual — approx. 120 pp.

   Covers all procedures involved in a centralized serials check-in--how to order, establish a new title, claim, pay invoices, handle "catalog as mono" serials, etc.

2. Bindery Preparations Manual — approx. 30 pp.

3. Harrassowitz Manual — approx. 20 pp.

   Covers German approval plan procedures.

4. Filing in Public Catalog (Divided) — (First draft complete.)

5. SOLINET Processing Unit Manual — Draft currently in process.

AVAILABLE FROM SPEC



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| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc.) |
|---|---|---|---|---|
| **LOUSIANA STATE U. (Caroline Wire - 504-388-2217)** | | | | |
| Use of OCLC Terminals | X | | Manual | Interlibrary Loan |
| Serials procedures | X | | Manual | LSU Library |
| Catalog typing procedures | X | | Manual | LSU Library |
| *Practically every department within the Library has its own procedural manual. | | | | |
| **MC GILL UNIVERSITY (Marianne Scott - 514-392-4949)** | | | | |
| Staff Performance Evaluation Program<br>* in cooperation with ARL | X* | | Manual | Training materials held by:<br>SPEC |
| **MC MASTER UNIVERSITY (Margaret Maggs - 416-525-9140)** | | | | |
| 1. Cataloguing/Coding | | x | "UNICAT/TELECAT Coding manual. | From : Office of Library of Coordination, Council of Ontario Universities, Toronto. |
| 2. " " | | x | "Terminal Operators Guide" | |
| 3. " " | | x | "Bibliographic Standards" | |
| 4. Documents Coding | | x | CODOC Coding Manual | As above. |
| 5. Map Cataloguing | x | | Manual of Cataloguing Proc. | Not Available. |
| 6. Catalogue Filing | | x | Rather, John C. Filing arrangement in the Library of Congress. | Library of Congress |
| 7. " " | x | | Rather Rules: Short Manual 1976. | McMaster. |
| 8. Searching/Ordering | x | | Instruction Sheets | Not Available. |
| 9. Circulation Services Procedures (for circulation, Reserve, stacks etc.) | x | | Manual of Procedures | Not available - under constant revision. |
| 10. Reference Services Training Questions | x | | Sheets of Questions | McMaster. |
| 11. I.L.L. Procedures | | x | OULCS Map Project ILL Handbook | Office of Library Coordination. |
| 12. " " | | x | Standard ILL Codes & Telex Manuals. | |



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U. OF MARYLAND (Sharon Taber - 301-454-3011)

| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc. |
|---|---|---|---|
| Library of Congress Call Number System and shelving | x | Individual sheets which are included in a more comprehensive manual. | |
| Telephone use tips | x | Summary sheet compiled from a booklet from the telephone company. | |
| Equipment operation | x | Operating manuals from the various pieces of equipment. | |
| Public services attitudes | x | Videocassette(15 min.) | From Nonprint Media Department. Requesting party must provide the blank tape. |
| Student Assistants | x | Departmental manual and oral instruction. | |
| Staff | x | Same | |
| Student Assistance: Shelving, general clerical operating Automated circulation system, Attitudes when dealing w/public. | x | Student Assistant Training Manual video Tape on public service - walking tour- (self-guided) | from UGL must provide own blank tape |
| Principal Desk Supervisor- Supervision of work flow at public service desk- training students & staff assigned include such things as operating Automated equipment, opening and closing library, evaluating subordinates work etc. | x | Training Manuals for the following positions: Principal Loan Desk Supervisor Nights/Weekends Supervisor | |



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U. OF MARYLAND (CONT'D)

| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc. |
|---|---|---|---|
| Billing Supervisor-includes technical work associated with automated billing system-including operation of CRT termina! | x | Billing Operations Manual | |
| Personal Reserves: includes procedures relating to Patron Request System | x | Personal Reserves Manual | |
| Reference Librarian Orientation-Some is "routine" for "skills" this pattern is routine now. | x | A self-directed, individualized series of objectives over initial 6 mos. period | Sample Available |
| Desk Service Training Manual for Student Assistants and Staff in Periodicals/Microforms Unit | x | Manual | |
| Binding and Claiming Serials | x | Manual | |
| Serial Adds and Withdrawals | x | Manual | |
| "Keep Customer Satisfied" providing good public service | x | Manual | |
| Undergraduate Library Paperback Collection: Training Procedures | x | Manual | |
| Student Training Manual, Reference | x | Manual | |
| Keep the Customer Satisfied | x | Script | |



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|---|---|---|---|
| MASS. INSTITUTE OF TECHNOLOGY | (Jay Lucker - 617-253-5651) | | |
| For all listed below: | X | Manual | Available from Director of Libraries, M.I.T. @ $.10/page |
| Barker Engineering Library | | | |
| Processing | | | 100 pages |
| Ordering | | | 100 |
| Reference Procedures and Sources | | | 300 |
| Catalogue Department | | | |
| Typing Manual | | | |
| Book preparation | | | 4 |
| Authority card typing | | | 14 |
| On-line input | | | 13 |
| On-line procedures | | | |
| Call number input; fixed fields; terminal use; card ordering instructions; etc. | | | 197 |
| General manual of procedures | | | |
| Policy statements, procedural routines, e.g. classification, marking volumes, authority file organization and maintenance, analytics, NUC reporting, thesis, cataloging, etc. | | | 350 |
| Collections Development | | | |
| Pasting and labeling | | | 21 pages |
| Pre-order searching | | | 11 |
| Binding forms | | | 2 |
| Humanities Library | | | |
| Interlibrary Loan Assistant | | | 20 |
| Interlibrary Borrowing Assistant | | | 25 |
| Monographs Assistant | | | 25 |
| Serials Assistant | | | 10 |
| Reference Assistant | | | 15 |
| Microform Assistant | | | 5 |
| Humanities Secretary | | | 100 |
| Music Library | | | |
| Circulation | | | 10 |
| Processing | | | 5 |
| Reserve Book Room | | | 25 |
| Rotch Library of Architecture and Planning | | | |
| Circulation manual for desk assistants | | | 12 |
| Search procedures | | | 7 |
| Guide for selection librarians | | | 7 |
| Storage procedures | | | 2 |
| Processing | | | 50 |



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|---|---|---|---|---|
| **M.I.T. (CONT'D)** | | | | |
| Science Library | | | | |
| Course reserves | | | | 55 |
| Reclassification and card correction | | | | 38 |
| Orders and receipts (monographs and serials) | | | | 66 |
| Periodicals and binding preparation | | | | 115 |
| Circulation Department | | | | |
| Circulation | | | | 120 |
| Registration | | | | 34 |
| Stackers | | | | 31 |
| Billing | | | | 43 |
| Desk Assistants | | | | 81 |
| Bookcheckers | | | | 75 |
| Chemistry Reading Room | | | | 150 |
| Lindgren Library of Earth and Planetary Sciences | | | | 16 |
| **U. OF MASS. - AMHERST** (Virginia Conrad - 413-545-0284) | | | | |
| Answering Reference Phone | X | | Procedure | SPEC |
| Reference Assistants Reference Services | X | | Manual 43 p. | ERIC ED 116 701 |
| Instructions for Bibliography Division Searchers | X | | Procedures | SPEC |
| Monographic Search | X | | Manual | SPEC |
| Government Doc. Processing | X | | Procedures | SPEC |
| Bindery Procedures | X | | Procedures | SPEC |
| Shelfist Filing | X | | Manual | SPEC |
| Miscellaneous Technical Services Procedures | X | | Procedures | SPEC |
| Reserve Desk Procedures | X | | Procedures | SPEC |
| Interlibrary Loan Clerical Procedures | X | | Procedures | SPEC |
| **U. OF MIAMI** (Paul Feehan - 305-284-3232) | | | | |
| Student Assistants - Paging, Shelving, Shelfreading | x | | Manual | |
| **U. OF MICHIGAN** (Lynn Marko - 313-764-9356) | | | | |
| 1. Training and Development Department of the University prepares many courses useful to library programs; They also will assist in the preparation of programs needed for specific library use. | | X | Course format | Some are on a cost chargeback basis, some are without charge to University of Michigan units. They will also respond to requests from other agencies. |
| 2. Data base searching | X | | Lecture/demonstration | Local |



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| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc.) |
|---|---|---|---|
| **U. OF MINNESOTA** (Clarence Carter - 612-373-3097) | | | |
| Shelving, Pick-up and Straightening, and Shelf Reading. | x | Manual | |
| Inventories are done by one staff person assisted by flow sheets. | x | | |
| Card Filing based on Manual with local modification of L/C filing rules. Official citation: Filing Rules for Dictionary Catalogs of the Library of Congress published by the Processing Department of the Library of Congress, WASH, 1956. | x | Manual | |
| **NATIONAL LIBRARY OF MEDICINE** (Robert B. Mehnert - 301-496-6308) | | | |
| Technical Services Division | | | |
| 1. Card filing for the public card catalogs | x | Printed manual and self-instructional exercises | On request from the Division |
| Reference Services Division | | Printed manual, about two years old covers items 2 through 8. An updated version will be ready in 1978. | On request from the Division |
| 2. Sorting interlibrary loan requests | x | | |
| 3. Shelving | x | | |
| 4. Charging out material | x | | |
| 5. Processing interlibrary loan requests | x | | |
| 6. Searching catalogs | x | | |
| 7. Processing Reading Room requests | x | | |
| 8. Handling TWX messages | x | | |
| 9. Orientation to the Loan and Stack Section | x | slide/tape | Not available |



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| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc.) |
|---|---|---|---|---|
| **U. OF NEBRASKA-LINCOLN** (Kathryn Lundy - 402-472-2526) | | | | |
| Day to day Branch Library Operations - Circulation, card filing, inventory, etc. | | | | Manuals exist in single copies and are not generally available. Photocopies can be made at a standard per page charge of 15 cents. |
| Architecture | X | | manual | |
| Chemistry | X | | manual | |
| Dentistry | X | | manual | |
| Engineering | X | | manual | |
| Geology | X | | manual | |
| Life Science | X | | manual | |
| Physics | X | | manual | |
| Shelving/Shelf Reading for Student Assistants | X | | manual | |
| Inventory Procedures | X | | manual | |
| Fine/Billing Procedures | X | | manual | |
| Central Reserve Procedures | X | | manual | |
| Microforms Operations (shelving, equipment use) | X | | manual | |
| Interlibrary Loan Procedures (TWX use, etc.) | X | | manual | |
| Public Service Division Office Procedures (order-supplies, book orders, file maintenance etc.) | X | | manual | |
| Documents (filing in docu-shelflist, shelving of documents etc.) | X | | manual | |
| Audio Procedures ( use of equipment, care of records, etc.) | X | | manual | |
| Serials check-in and check-in file maintenance | X | | manual | |
| Descriptive Cataloging Rules | | X | AACR Chpt. 6 Rev. | |
| On-line Cataloging | X | X | OCLC manuals | |
| Cataloging Procedures | X | | Various inhouse documents (nothing systematically gathered under a single cover) | |
| Card Typing | X | | Inhouse manual | |
| Filing in Public Card Catalog | X | | Inhouse manual | |
| Binding Procedures | X | | Inhouse manual | |
| Gift & Exchange Procedures | X | | Inhouse manual | |
| **N.Y. PUBLIC LIBRARY** (Katherine O'Brien - 212-695-3231) | | | | |
| Training Handbook for Clerical Supervisors in Public Service Units in Branch Libraries | x | | Training Manual | |
| Manual for Page Supervisors | x | | Training Manual in Branch Libraries. | |



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| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc.) |
|---|---|---|---|---|
| **PENNSYLVANIA STATE U.** (Anne Minshall - 814-865-0401) | | | | |
| Penn. Documents Processing | x | | Manual | |
| U.S. Documents Processing | x | | Manual | |
| International Documents Processing | x | | Manual | |
| Bibliographic Record Input Sustem Procedural Manual | x | | Manual | |
| Acquisitions | x | | Manual | |
| Pollcck Library Student-Asst. | x | | Manual | |
| **PRINCETON UNIVERSITY** (Roger Parent - 609-452-3271) | | | | |
| Bibliographic instruction: a) Introduction to the classification schemes, Richardson and LC, used at Princeton. b) Introduction to the card catalog. | X | | Lecture and transparencies | Not Available |
| Filing: A documentation of PUL, filing rules and long-standing practices. Used by filers and searchers. 117 pp. | X | | Manual | Available from Library at cost. Approx. $4.-, "Plus $1.00 Postage" |
| Typing: A manual of procedures and the form used in typing monographic catalog cards in MARC format. 74 pp. | X | | Manual | Available from Library at cost. Approx. $3.-, "Plus $1.00 Postage" |
| **RUTGERS UNIVERSITY** I.(Mary Henry - 201-932-7290) II. (Ann Montanaro - 201-932-7505) | | | | |
| I. Filing Catalog Cards | x | | Filers' manual | From library |
| Filing Catalog Cards | x | | Programmed Learning Filers' manual | From library |
| II. Manuals on: Reserve, Automated Circulation Systems, Binding, Government Publications Shelving, Station Fill, Recall, Missing Books, and Control of Reference. | | | | |


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SOUTHERN ILLINOIS U. (Darrell Jenkins - 618-453-2683)

| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes | No | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library costs, etc.) |
|---|---|---|---|---|
| I. Catalog Department (includes title of training material) | | | | |
| ORIGINAL CATALOGING | | | | |
| Technical Services Manual of Procedure | X | | Manual (much outdated; revised by Memoranda.) | from library (copy costs ) |
| Cataloging Department Memoranda. 1968- | X | | Loose-leaf manual | from library (copy costs) |
| Filing Rules (local) | X | | Manual | from library (copy costs) |
| Instructional Materials Center (IMC) Cataloging Manual. | X | | Manual | from library (copy costs) |
| Library of Congress. Cataloging Service Processing Dept. Bulletin, no. 79- . 1967- | X | | Loose-leaf serial | Library of Congress. |
| ____. MARC Development Office. Books, a MARC Format. 5th ed. 1972 | X | | Book | Library of Congress |
| ____. Country of Publication Codes. 1973. (Introduction) | X | | Pamphlet | Library of Congress |
| ____. Geographic Area Codes 1973. (Introduction) | X | | Pamphlet | Library of Congress |
| Music Library Association. Music Cataloging Bulletin. 1970- | X | | Serial publication | MLA |
| Ohio College Library Center, On-Line Cataloging. 1973. and Addenda. | X | | Book | OCLC |
| _____. On-Line Cataloging of Scores. Preliminary Document. 1976. | X | | Book | OCLC |
| _____. On-Line Cataloging of Sound Recordings. Preliminary Document. 1976. | | X | Book | OCLC |
| _____. Technical Bulletin. 1976- | | X | Serial publication | OCLC |
| Parker and Thompson. Revised List of Languages. 1977. (Introduction) | | X | Book | Library of Congress. Bibliographic Systems Office |



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SOUTHERN ILLINOIS U. (CONT'D)

| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes | No | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library costs, etc.) |
|---|---|---|---|---|
| Sliss. "Brief Guide to Fixed and Variable Fields in OCLC-Monographs." | | X | Xeroxed from INCOLSA newsletter | INCOLSA? |
| OCLC OPERATIONS | | | | |
| On-line Cataloging. (See above) | | | | |
| SOLINET. Terminal Training Manual. | | X | Manual plus 5 tape cassettes | SOLINET |
| PALINET. Manual for Operation of the OCLC 100 Terminal and the OCLC System for On-Line Cataloging. | | X | Manual | PALINET |
| Cataloging With LC Cards. | X | | Four-page hand-out | from library (free) |
| How to Edit Records. | X | | Hand-out | from library (free) |
| Series Tracings and How to Code Series Fields to Match SIU Authority File Series Decisions. | X | | Hand-out | from library (free) |
| Brief List of Command Keys | X | | One page hand-out | from library (free) |
| OCLC Technical Bulletin No. 2: "Changes to On-Line Displays." | | X | (See above) | |
| Added Volumes and Copies Procedures | X | | Manual | from library (copy costs) |
| SEARCHING | | | | |
| Filing Rules (see above--Filing Rules (local) | | | | |
| Subject Heading Verification | X | | Manual | from library (copy costs) |
| Reclassification | X | | Manual | from library (copy costs) |
| Marking and Processing | X | | Manual | from library (copy costs) |
| Keypunching Book Cards | X | | Manual | from library (copy costs) |
| Xeroxing Catalog Cards | X | | Manual | from library (copy costs) |
| Typing Catalog Cards | X | | Manual | from library (copy costs) |



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SOUTHERN ILLINOIS U. (CONT'D)

| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes | No | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library costs, etc.) |
|---|---|---|---|---|
| II. Education/Psychology Division | | | | |
| General procedures | X | | loose-leaf update manual | from library (copy costs) |
| III. Humanities Division | | | | |
| General filing (including Humanities Division Special Author Scheme) | X | | Manual | from library (copy costs) |
| IV. Law Library | | | | |
| Orders section | X | | single sheets from manual | from library (fre |
| Cataloging section | | | | |
| OCLC Operations | | | | |
| Ohio College Library Center. On-Line Cataloging. 1973. and addenda. | | X | Book | OCLC |
| OCLC Newsletters. | | X | Newsletter | OCLC |
| General procedures | | X | Audio tape | SOLINET purchase |
| General procedures | | X | Video tape | OCLC/Kent State U. purchase |
| General procedures | X | | Oversize catalog cards | from university facilities |
| Description of work flow | X | | chart | from library (copy costs) |
| Filing rules (local outline based on ALA abridged) | X | | individual sheets | from library (copy costs) |
| Listing and description of bibliographic tools for searching | X | | individual sheets | from library (copy costs) |
| V. Map Library (part of Science Division) | | | | |
| General operations and procedures | X | | Manual | from library (copy costs) |
| VI. Science Division | | | | |
| General procedures | X | | loose-leaf update manual | from library (copy costs) |

STANFORD UNIVERSITY (Elsi Goering - 415-497-2016)

| | | | | |
|---|---|---|---|---|
| Loan Desk, Shelving, Orders. | x | | Manuals | SPEC |
| Processing Books for Reserve | x | | Manual | SPEC |
| General Info. for Student Asst. | | | Meyer Library - Manual | SPEC |
| Understanding Reserve Operation | | | Meyer Library - Manual | SPEC |
| Searchers Manual | x | | Meyer Library - Manual | SPEC |
| AV Services | x | | Meyer Library - Manual | SPEC |
| Night Supervisors | x | | Meyer Library - Manual | SPEC |



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|---|---|---|---|---|
| **SUNY - STONY BROOK** (Harold Schleifer - 516-246-5650) | | | | |
| Circulation Procedures | x | | Manual | Through SPEC |
| OCLC Serials Cataloging | x | | Workbook | From Library @$1.25 |
| Periodicals Inventory | x | | Manual | Through SPEC |
| Periodicals Claiming | x | | Manual | Through SPEC |
| **SYRACUSE UNIVERSITY** (Gregory Bullard - 315-423-2575) | | | | |
| Technical Procedures | x | | Manual | |
| Science Library Procedures | x | | Manual | |
| **U. OF TENNESSEE** (George Shipman - 615-974-4217) | | | | |
| Main Library Reserve Dept. | X | | Manual | Available at the library for cost of duplication |
| Monographs Order Procedures Manual | X | | Manual | Available at the library for cost of duplication |
| Undergraduate Library Reserve Manual | X | | Manual | Available at the library for cost of duplication |
| **TEXAS A & M** (Pamela Walton - 713-845-6111) | | | | |
| Processing New Books | x | | Manual | |
| Bibliographic Search | x | | Manual | |
| 1) Bibliographic Searching for Acquisitions Department | X | | Manual with sample cards, title pages, etc. | Request from TAMU Library Cost: To be determined |
| 2) Cataloging with Copy of New Materials | X | | Manual | Same as above |
| 3) Serials - Checking in and Processing | X | | Manual including samples of actual records using ACME flimsies, title pages, etc. | Same as above |
| 4) Current Periodical Reading Room Shelving, Keeping of statistics, general maintenance | X | | Manual | Same as above |





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|---|---|---|---|---|
| **U. OF TEXAS AT AUSTIN** (Keith Russell - 512-471-3811) | | | | |
| OCLC | | X | text: On-line Cataloging, 1973, OCLC | OCLC |
| OCLC | | X | text: Self-Instructional Introduction to the OCLC Model 100 Terminal, by Bonnie Juergens, 1976, AMIGOS Bibliographic Council, Richardson, Texas | AMIGOS Bibliographic Council |
| MARC Tagging | X | | problem set, 150 pp. | (currently being reprinted) |
| Simplified OCLC Searching (for students & faculty) | X | | 2 page handout | |
| Use of the public catalog (and supplement) | X | | 29 page handout, plus 5 page supplement | |
| Operation of Video-370 terminals | X | | 3 page handout | |
| Pre-cataloging serials searching (in prep) | X | | approximately 30 pages | not yet available |
| **U. OF TORONTO** (Sylvia Newman - 416-978-5320) | | | | |
| I. Bibliographic Processing Dept. | | | | All material available from library |
| 1. General policies and procedures | X | | 1. Manual (3 loose-leaf volumes) | Charge made for cost of photocopying |
| 2. Interpretation of cataloguing rules | | X | 2. Manual of LC catalogue service bulletins | |
| 3. Computer terminal operations | X | | 3. Terminal operator's manual (1 volume) | |
| 4. Coding procedures for on-line catalogue support system | X | | 4. Monograph coding manual and coding samples manual | |
| 5. Cataloguing | X | | 5. File of cataloguing samples | |
| II. Book Selection Dept. procedures | | | | |
| 1. Procedures for administrative assistant position | X | | 1. Manual (40 p.) | |

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|---|---|---|---|---|
| U. OF TORONTO (CONT'D) | | | | |
| 2. General book selection procedures | X | | 2. Manual (60 p. - under revision) | |
| III. Catalogue Records Department Procedures: | | | | |
| 1. Pre-order searching | X | | Manual (under revision) | |
| 2. Terminal operations | X | | Terminal operator's manual | |
| 3. Section procedures | X | | Loose-leaf written procedures pages (approx. 5 p. each) | |
| IV. Circulation Department Procedures - a programme is drawn up for training in the various positions and sections as follows: | X | | Detailed training sheets are available for each position and section. Stacks section has a training manual | - from library |
| Book Dispatch<br>Charge Desk<br>Charge File<br>Collection Maintenance (includes Stock taking)<br>Interlibrary Loans<br>Loan Request<br>Overdues and Fines<br>Page<br>Periodicals Reading Room<br>Reserves<br>Slip Dispatch<br>Searches<br>Sorting Area<br>Stack Exit<br>Stacks<br>Telephone Request & Book Delivery | | | | |
| V. Order Department Procedures | | | | |
| 1. Book keeping | X | | Manual (35 p.) | |
| 2. Dealer selection ordering | X | | Manual (13 p.) | |

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|---|---|---|---|---|
| U. OF TORONTO (CONT'D) | | | | |
| 3. Secretarial procedures | X | | Manual (7 p.) | |
| 4. Processing | X | | Manual (19 p.) | |
| 5. Mail-room | X | | Manual (2 p.) | |
| 6. Order preparation: (a) Typist | X | | Manual (30 p.) | |
| (b) Correspondence Clerk | X | | Manual (6 p.) | |
| (c) "Wants" | X | | Manual (22 p.) | |
| VI. Reference Department | | | | |
| A. General Reference | | | | |
| 1. Dept. procedure | X | | Manual (140 p.) | |
| 2. Computer search'g | X | | Manual (40 p.) | |
| B. Government Publications | X | | Manual (under revision) | |
| C. Microtext | | | | |
| 1. section procedures for staff and student assistants | X | | Manual (3 p.) | |
| 2. use of microtext equipment | X | | Guide (13 p.) | |
| D. Map Library | | | | |
| 1. procedures for technician | X | | Manual (50 p.) | |
| 2. procedures for clerk typist | X | | Manual (35 p.) | |
| 3. Reference desk procedures | X | | Manual (40 p.) | |
| VII. Science & Medicine Library | | | | |
| 1. Circulation procedures and regulations | X | | Loose leaf manual (approx. 150 p.) | |

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| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc.) |
|---|---|---|---|
| U. OF TORONTO (CONT'D) | | | |
| 2. Reference procedures and regulations | X | Loose-leaf manual | |
| 3. Interlibrary Loan forms and regulations | X | Manual | |
| 4. Periodicals Section procedures for librarians, technicians and student assistants | X | Loose-leaf manual (3 v.) | |
| 5. Dept. Office procedures and secretarial duties | X | Loose-leaf manual | |
| VIII. Serials | | | |
| 1. Serials acquisitions procedures | | | |
| a) - new orders, creation of records, kardex entering, title changes and cessations binding approvals. | X | Manual | |
| b) typing procedures | X | Manual | |
| c) claims/letters for typists in billing section | X | Manual | |
| 2. Serials Cataloguing | X | Manual | |
| IX. Sigmund Samuel Library | | | |
| A programme of training is drawn up which includes training in various sections of the dept. using a combination of a training manual (under revision), a reference manual, | | | |

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| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes | LIBRARY-PRODUCED? No | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc.) |
|---|---|---|---|---|
| **U. OF TORONTO (CONT'D)** | | | | |
| written procedures, and worksheets<br><br>e.g.,<br>LC Call number order<br>book sign-out<br>book return<br>information services<br>etc. | | | | |
| **X. Photoduplication Unit** | | | | |
| 1. Photoduplication procedures and regulations | X | | Loose-leaf manual (approx. 50 p.) | |
| 2. Photography equipment and procedures | | X | Manuals | |
| 3. Microfilming procedures and equipment | X | X | Loose-leaf manual (approx. 40 p.) | |
| **VPI & SU** (A.R. Pierce/Velda Burkhart - 703-951-5593/4) | | | | |
| Typing | X | | Department Manual<br>Supervisors Minutes | Library |
| Data entry (automated) | X | | Manual for CFS | Library |
| Pre-catalog searching | X | | Department Manual<br>Minutes | Library |
| Filing | | X | Library of Congress filing rules<br>Supervisors Minutes | Library of Congress<br>Library |
| Xeroxing, labelling, marking | X | | End Processing procedures<br>Department Manual<br>Minutes | Library |
| All procedures | X | | Department Manual<br>Minutes of Supervisors meetings<br>Job descriptions | Library<br>"<br>" |

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| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc.) |
|---|---|---|---|---|
| **VPI & SU (CONT'D)** | | | | |
| Data Entry for CFS | X | | Manual; informal instruction; lectures on cassette | |
| Online Literature Searching | X | | Slides; lecture; trial searches | Upon request |
| Circulation Desk | X | | Manual | |
| Monographic End Processing | X | | Manual | |
| Reserve Desk | X | | Manual | |
| ILL Routines/TWX | X | X* | Manuals | |
| Circulation | X | | Manual (Draft) | |
| **WASHINGTON UNIVERSITY** (John Strecker - 314-863-0100 ext. 4523) | | | | |
| Duties, Responsibilities of Exit Control Staff | x | | Manual | |
| Biology Library - Student Asst's Manual | x | | Manual | |
| Circulation Department - Discharging, Sorting, Additions, Corrections, and Kills. | x | | Manual | |
| **U. OF WASHINGTON** I.(Curtis Stuki - 206-543-1828) II.(Linda Evans - 206-543-2553) III.(Sandra Ashby - 206-543-5530) | | | | |
| I. Card filing | X | | Manual | Available for $ 2.50 per copy from Microfilm Services Suzzallo Library FM-25 University of Washington Seattle, Wa. 98195 |
| Book processing (incl. card typing and book typing) | X | | Sheet rules (see attached) Card rules (see samples; each Library Technician has a set of rules consisting of several hundred rules for books and card processing.) | No No |
| II. Exit Checking; Filing; Shelving; Carding | x | | Manuals | |
| III. Shelving Monographs in Health Sciences Library | x | | Manual | |



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| PROCEDURE TAUGHT | LIBRARY-PRODUCED? Yes/No | | TYPE OF MATERIAL (textbook, manual, slide set, etc.) | CONDITIONS OF AVAILABILITY (through SPEC, from library, costs, etc.) |
|---|---|---|---|---|
| **U. OF WISCONSIN/MADISON** (Silvia Watson - 608-262-3521) | | | | |
| 1) Binding Books | X | | Manual | |
| 2) Book Acquisitions | X | | Manual | From library |
| 3) Circulation | X | | Manual | " |
| 4) Closing Procedures | X | | Manual | |
| 5) College Catalogs & Telephone Directories | X | | Manual | " |
| 6) Emergency Procedures | X | | Tape Cassette | " |
| 7) Filing | X | | Manual | |
| 8) Journals | X | | Manual | " |
| 9) Orientation | X | | Tape Cassette | |
| 10) Reference Skills | X | | Tape Cassette | " |
| 11) Shelving | X | | Manual & Tape Cassette | |
| 12) Typing | X | | Manual | " |
| 13) Handbooks - compilations of procedures including the above. | X | | Manual | " |
| **YALE UNIVERSITY** (Barbara Von Wahlde - 203-436-1268) | | | | |
| 1. Filing of cards in card catalogs | X | | Manual (called filing lessons) | SPEC |
| 2. Library vocabulary | X | | Glossary (of library terms) | - |
| 3. How a book is ordered & catalogued (orientation to tech. services & collection development) | X | | slide/tape program | tape can be borrowed |
| 4. OCLC terminal training | | X | SOLINET training manual (self-instructional booklet & audio tapes) | Available from SOLINET by purchase or loan from NELINET |
| 5. OCLC terminal training | | X | 4 video tapes (Kent State tapes) | We have loaned this to nearby neighboring libraries (Princeton & UCONN) |
| 6. Bibliographic searching | X | | manual | Copy could be borrowed from Yale or reproduced at cost of Xeroxing |



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